

# Implementing strategy: ideas and inspiration

By Stella Smith for Charities Evaluation Services

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Charities Evaluation Services' National Performance Programme has commissioned this work from Stella Smith. Stella is an independent consultant specialising in strategy and change in the not-for-profit sector. She has provided advice and training to a range of organisations from large national charities to small community and self help groups.

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## About this guide

This guide is for staff and volunteers whose job it is to make strategic plans a reality. It assumes that the strategic plan has been written, the analyses completed and the stakeholders consulted. Now it's time to make the strategy happen.

This guide takes six main areas of activity in strategy implementation and presents a collection of frameworks and techniques to guide you in supporting your organisation to achieve its vision.

These approaches can be adapted for people working in organisations of all sizes. However, it has been written with a particular focus on small to medium sized charities, where there are likely to be at least ten members of staff but probably not more than 50.

Dip in as and when you need some inspiration and new ideas to go forward.

## A few words about strategy

There are many different definitions of strategy, but in essence, strategy is what an organisation does; the activities it carries out, to achieve its overall objectives.

There are a range of approaches to develop a strategic plan, the document which sets out a proposed strategy. They set out the areas to consider, the issues to analyse and frameworks to support decision making.

In contrast to other planning processes, a strategic planning process focuses on issues which will have a significant impact on the ability of the organisation to meet its overall aims and objectives. It is concerned with longer term, big picture trends and concerns as opposed to those which are more detailed or short term.

Throughout this guide the terms strategic objectives and strategic outcomes are used. In this context, the following meanings are intended.

Strategic outcomes are the big changes in the world that an organisation achieves. These may be a healthier environment, more confidence among young people or older people being more engaged with the world around them. Strategic outcomes are often broad and quite difficult to measure. Achieving a strategic outcome will often be the result of achieving several more specific strategic objectives.

Strategic objectives are more specific and refer to the intentions which an organisation has in carrying out activities. By achieving its strategic objectives an organisation will in turn achieve its outcomes. For example, an organisation's overall strategic outcome might be 'increased confidence among young people'. The strategic objectives which will go towards achieving this outcome could include these young people attending a youth project or participating in activities.

Resources and guides to support strategic planning can be found in the appendix.

# The big six

This guide has been organised according to six aspects of strategy implementation: communicating, developing ideas, prioritising and decision making, scheduling and allocating resources, doing it, and reviewing it.

## 1 Communicating

Communication is at the heart of implementing your strategy. Good communication is when the message intended is the message received. While this may seem obvious, it can be much more complex and difficult than you might think.

### Checking understanding

Before embarking on implementing strategy, ensure that everyone involved in implementation including staff, volunteers and trustees share the same understanding of what is intended. This requires exploring the strategic objectives and what they involve.

### Discussion

Discussions with more than three or four people can be difficult to manage and some people may find it difficult to participate. If you are working with a large group of more than about seven or eight, divide the group into smaller groups of three or four. Ask the smaller groups to look at the strategic objectives and for each one discuss:

- what exactly is required  
What would success look like? What are the performance measures or indicators?
- who the target audience for this objective is  
For example, is this something funders, service users or local authority partners want to see?
- the context for the performance measures.  
What might be the underlying concerns or interests of the target audience? (Sometimes performance measures can unintentionally prompt unhelpful behaviours by encouraging people to take actions which focus on meeting the measures to the detriment of achieving wider or longer term aims. This discussion will help develop a shared

understanding of the context around the performance measures and why they have been set and so discourage short term thinking).

Once the smaller groups have had the opportunity to consider these questions, bring them back together. Make sure everyone has a shared understanding of:

- what the objectives or outcomes stated are aiming to achieve
- what the milestones are
- the wider context
- what the timescales for updates, feedback and progress reports are.

## Activity

If the team is feeling more creative, drawing pictures can be a great way of sharing expectations.

- Split the group into twos and threes (many people are not confident artists and will appreciate working with others).
- Give each couple or trio a sheet of flipchart, the strategic objectives or outcomes and a selection of coloured pens, pencils and/or crayons.
- Ask the group to consider the objectives or outcomes and imagine the future where the strategy has been successfully implemented.
- Their task is to draw this scenario. Ask them to be detailed, to show in the picture what they will see, hear, feel when the strategy is successful.
- After around 15 minutes, ask the groups to compare pictures – what are the similarities, where are the differences, what are the assumptions?
- What are the implications of these for how you go forward with implementation? Make sure you all have a shared understanding of the objectives or outcomes, the milestones, the wider context and what the timescales for updates, feedback and progress reports are.

## Signposts

For more ideas on facilitating effective communication look at:

[www.mindtools.com](http://www.mindtools.com)

*How to Win Friends and Influence People* (Carnegie 1936).

## 2 Developing ideas

Having developed a shared understanding of what you are aiming to achieve, it is important to involve people in developing ideas on how you are going to achieve it. You can of course simply ask people for their ideas, but this is unlikely to spark innovative thinking: if people sit in the same place, with the same people in the same room, they will tend to come up with very similar ideas. If you want to inspire new thoughts and approaches, as well as have some fun, try having different discussions.

### List the negatives

One approach to develop a comprehensive list of good ideas for a way forward is 'reversing'.

- Ask everyone to list all the ways they could ensure you do not reach your objectives. All the different ways you could ensure it does not happen, it goes wrong, in fact, how you can be sure it is a complete disaster!
- This question generally provokes a good response. Write on a flipchart a list of all the different ideas of what you could do to ensure failure.
- Once you have a long list of what not to do, go through each suggestion and reverse each action so it is a positive.
- This will give you a good list of positive suggestions.
- If you have too many ideas you will have to prioritise.

### Analogies

Analogies are where you draw comparisons between two different things. It can be a helpful way of seeing a new perspective on familiar situations. To encourage interesting discussions, try comparing the process of implementing your strategy with something else.

So, you could try comparing the process of implementing the strategy to another job. The question you would ask the group is:

"If the process of implementing this strategy were a job, what would it be and why?"

Responses might be along the lines of:

"It's like being a train driver. We have the train and we know where we're going, but the most important aspect is ensuring all the right people are on



the train and want to go to the same destination and that they've paid for their ticket.”

“It's like being a gardener. We're nurturing and tending and taking after the seeds of some new ideas. We'll have to protect our ambitions from slugs and the neighbour's cat. When we're successful, it will be beautiful and something everyone can enjoy.”

You can then discuss what the implications of this are for the way that you will implement the strategy.

Other analogies which often work well are comparisons to vehicles or animals.

## Signposts

For more creative techniques to develop ideas take a look at:

[www.edwdebono.com](http://www.edwdebono.com)

*101 Creative Problem Solving Techniques* (Higgins 2006).

## 3 Prioritising and decision making

Having come up with different ideas and options you will want to prioritise and come to some decisions.

### Prioritise

One of the most straightforward ways to prioritise a list of options is to vote.

- Write each option on a sheet paper and put the papers around the room.
- Give each participant, the same number of stick on dots (between five and ten is usually enough).
- Participants wander around the room and can place their dots on whichever options they prefer. They can use all their dots as they wish, sticking several on one option and none on others if they prefer or if they choose they can put all their dots on one option.
- When everyone has used voted the option with the most votes goes forward.

Here are two useful techniques for assessing the pros and cons of different options.

### De Bono's Six Thinking Hats

This is a way of looking at a potential option or scenario from five different perspectives, represented by five different coloured hats, to facilitate discussion.

To start with, the proposal under consideration is set out. The group then has around five minutes to discuss it altogether, making comments only relevant to one perspective or 'hat'. After that five minutes is up the group then moves to discussing the proposal from the next perspective and so on until the proposal has been considered from five different perspectives.

The five perspectives are:

1. **White Hat (Rational)** what is the option or scenario? What are the facts? What will it involve?
2. **Red Hat (Emotional)** what are the person's gut feelings about the scenario (positive or negative)?

3. **Purple Hat (Negative)** what are the potential negative aspects of the scenario?
4. **Yellow Hat (Positive)** what are the potential positive aspects of the scenario?
5. **Green Hat (Creative)** can you think about ways to adapt the proposal to overcome the negatives and build on the positives before making a decision?

One person is nominated the timekeeper/interviewer and that person wears the sixth hat which is **Blue Hat (Overview)**. This person keeps an eye on the overall process, ensures that participants only discuss the scenario from the relevant perspective and moves the conversation along to make sure that all perspectives are covered.

### Matrix decision making

This is a popular decision-making framework to help compare different options. Firstly you need a clear picture of the desired outcome and what the criteria of success are for the desired outcome. The criteria are listed down the left hand side of the matrix and the options under consideration are listed across the top. Each option is scored in relation to each criterion, giving the worst option a score of 1, and the best option a score of 3. When you have finished, add up the total score for each option. The option with the highest score is the winner.

Below is an example for choosing where to go on holiday.

The Ideal Scenario: a cheap holiday, somewhere warm, near the sea.

	Sunderland	Costa Blanca	Biarritz
Cost (low = 3, high = 1)	2	3	1
Warm climate (hot = 3, cold = 1)	1	3	2
Near the sea (near = 3, far = 1)	3	3	3
<b>TOTAL</b>	<b>6</b>	<b>9</b>	<b>6</b>

## Signposts

For more frameworks to help with decision making (as well as many other useful resources) look at:

[www.businessballs.com](http://www.businessballs.com)

## 4 Scheduling and allocating resources

Having explored ideas and made decisions on the way forward, the next stage is planning what will actually happen.

For each area of work, write down every activity that will need to happen. Don't worry about them being in the correct order. Once you have lists of activities you need to sequence them.

The Gantt chart below is a useful way of sequencing. Use one Gantt chart for each objective, with the activities down the left and the timescale across the top.

The example given shows the different activities for recruiting staff.

### Scheduling activities

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
ACTIVITY						
Agree tasks we need help with						
Confirm new job descriptions and person specs						
Advertise						
Shortlist applications						
Interviews						
Make appointment						

### Costing activities

Having listed all the activities that need to happen, it is useful to detail the costs of activities. Your organisation is likely to have its own approach to budgeting, but typically you will need to develop a list of budget headings for income and expenditure.

Income budget headings are a list of all the places where you expect to get funding from for the work, such as:

- membership subscriptions
- contract income
- trust or foundation funding
- donations.

Expenditure budget headings are a list of all the costs associated with delivering a project or service and can be grouped into direct (or project costs) and indirect (or overhead) costs.

Direct costs are all costs which are specifically for the delivery of the project. They might include:

- equipment to be used directly for delivery of the project
- venue associated with delivering the project
- salaries of staff delivering the project
- staff travel to enable them in delivering the project
- meetings associated with the project

In assessing direct or project costs you need to be able to show that the costs are being used directly by the project only and are not in any way subsidising costs for other parts of the organisation.

Indirect costs or overheads are costs which are not directly part of the project which you are delivering but which you will incur from other parts of the organisation. These include costs of the whole organisation which the project will pay a contribution towards. For example:

- contribution towards heating, electricity, water for the whole organisation
- contribution towards the salary of the CEO and any managers and central office staff which the project shares with the organisation
- contribution towards the costs of the organisation's fundraising, marketing or audit costs.

Often an organisation will have its own formula for calculating how each team should contribute to these central costs.

It is important to consider inflation as well as the costs of setting up new activities, buying fixed assets, such as computers and vehicles, and every day costs, such as postage and telephone. Try to think of every possible cost and be as accurate as possible – it is worth talking to people in similar organisations or researching prices for equipment and stationery. It might be helpful to keep notes on how you reach your figures for future reference.

## Signposts

For further guidance on developing budgets and costs for your project, look at:

[www.financehub.org.uk](http://www.financehub.org.uk)

## Allocating responsibility

Many great plans go astray because people did not fully understand at the outset exactly what was expected of them.

For every activity it is vital to have a clear allocation of responsibilities at the outset. For each key task, draw up a responsibility list with a name against each one showing:

- who will make sure it happens and take overall responsibility
- who will provide support
- who will provide information
- who needs to give approval but will not be doing the work
- who would like to be kept informed of progress.

## Expect the unexpected

Rarely does the strategy implementation go exactly as planned. Staff leave, new staff arrive or funding stops.

Managing the impact of any unexpected event is best helped by considering beforehand what could happen and what might be the best way of managing it if it does.

The matrix on the next page is a useful framework for thinking through what could happen, what the consequences would be and how to manage them.

H – High

M – Medium

L – Low

<b>Event</b> What could happen that might affect implementation?	<b>Impact</b> How critical would this be to our plan?	<b>Likelihood</b> How likely is it that the event will happen?	<b>Mitigation</b> What will you do to minimise likelihood?	<b>Contingency</b> What will you do if it happens?
E.g. major funder withdraws support. This will lead to a significant drop in income and we might not be able to reach targets.	H	M	Diversify funding sources. Look at ways we can generate income	Increase our use of volunteers. Introduce hot desks and rent out desk space, Approach similar organisations to share back office costs.
E.g. key members of staff leave before project ends. This will mean no-one knows how to run the project.	H	L	Ensure all key staff are well supported, conduct regular reviews and appraisals, implement shadow system for all key staff so that other members of staff know all the important processes and knowledge is shared.	Implement well structured hand over and ensure all staff work full notice period.

## Signposts

For more information and frameworks to support planning look at:

[www.knowhownonprofit.org](http://www.knowhownonprofit.org)

*Just About Managing* (Adirondack 2006).



## 5 Doing it

### Prioritising your tasks

When people are struggling to stay on top of a busy workload, it can be difficult to find the time to incorporate new activities. There is a temptation to carry on with what we have always done, and try to squeeze new tasks in.

When implementing new tasks it's important to prioritise effectively. This means stepping back from the tasks themselves and looking at each in relation to the wider strategic objectives it is contributing towards.

To prioritise effectively:

- make a list of all the tasks you need to do
- prioritise each task
- work through each task accordingly.

**!** **Urgent:** these are the tasks which demand immediate attention. If you ignore these tasks it will have significant and immediate impact on wider objectives.

**A** **Must do:** these are the tasks which are important and will become urgent if not dealt with soon.

**B** **Should do:** these are the tasks which are important but will not have a significant impact on objectives in the short to medium term. Keep an eye on these as over time they will creep up into the 'must do' list.

**C** **Could do:** these are the tasks which will not have a significant impact on objectives but doing them may well make some of your other tasks easier. If you do not do these tasks over time they could detract from your overall effectiveness.

### Day plans and time management

If you ever come into work and find so much work to do, try writing day-plans before you go home each evening.

A day plan is quite simply a realistic list of what you can expect to achieve in one day. It takes your most urgent and important tasks, estimates the time each will take and sets out what you will do.

Don't forget to schedule in:

- time for lunch
- time for interruptions
- a realistic going home time.

If you have too many e-mails, paperwork and magazines, discipline yourself into looking at each e-mail or dealing with each piece of paper only once. For each decide there and then whether to:

- **file** – if you are being forwarded or copied in for information, read and file it
- **act / refer** – if you need to do something, do it and/or refer on
- **bin** – if you won't need it again, delete it.

## Signposts

To read more about developing personal effectiveness, look at:

*The 7 Habits of Highly Effective People* (Covey 1989).

## 6 Reviewing performance and celebrating progress

Before you know it, implementing the strategic objectives will be part of your everyday work. Key to maintaining momentum is scheduling in time for regular reviews of performance and acknowledging people's hard work.

### Reviewing performance

In the beginning, as you developed the strategic objectives, you will have developed expectations of what the situation will be like when you have achieved them. You will also have milestones and performance indicators to check that you are progressing in the right direction. As you implement your strategy you will need to check this progress. This will involve collecting monitoring information, comparing this information against the performance indicators and making changes accordingly to either your implementation plans or to the overall strategy.

Some of the most common ways of collecting monitoring information are:

- statistics (e.g. the number of visitors to your service or financial information)
- questionnaires
- interviews
- focus groups
- observation
- comments and complaints procedures.

Evaluating is comparing your expectations (the performance indicators) with the reality (the monitoring information). As you compare your monitoring information with your performance indicators consider the following:

- have you achieved your objectives?
- if not, why not?
- was the work done well?
- what could have been improved?
- what still needs to be done?
- what would you do differently next time?
- what would you change with regard to your implementation plan?
- is there anything that needs changing with regard to your overall strategy?

## Learning and celebrating

Rarely does it all go to plan! Events happen that could not have been predicted. Some objectives come together beautifully... and progress in other areas is not quite so smooth.

Take time out as an individual and as a team to consider:

- what you are proud of
- what you will do differently next time.

Then, take time out to celebrate! Whether it be a team lunch, an evening on the town or a walk round the park, be sure to create a relaxed space to appreciate what you have managed to achieve.

## Signposts

First Steps in Monitoring and Evaluation by CES (2002) is a comprehensive introduction to monitoring and reviewing performance.

You can download it for free from [www.ces-vol.org.uk](http://www.ces-vol.org.uk).

# Appendix

## Resources and guides for strategic planning

### Websites:

[www.knowhownonprofit.org](http://www.knowhownonprofit.org)

### Books:

Copeman, C, Bruce, I, Forrest, A, Lesirge, R, Palmer, P and Patel, A (2004) *Tools for Tomorrow*, Cass Business School/NCVO, London.

Copeman, C and Griffith, M (2007) *Looking Out, How to Make Sense of your Organisation's Environment*, NCVO, London.

Eliot, J (2008) *Thinking Ahead, An Introduction to Strategic Planning*, NCVO, London.

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Charities Evaluation Services  
4 Coldbath Square  
London EC1R 5HL  
t +44 (0) 20 7713 5722  
f +44 (0) 20 7713 5692  
e [enquiries@ces-vol.org.uk](mailto:enquiries@ces-vol.org.uk)  
w [www.ces-vol.org.uk](http://www.ces-vol.org.uk)