

Webinar: How to Create a Strategic Plan that Really Works for Your Association

Presenter: Belinda Moore, Strategic Membership Solutions

About This Session

- Associations can make a powerful and positive impact on the professions, industries, and causes they represent.
- This requires the association leadership to create a shared vision of the future and a clear roadmap towards it.
- A great strategy can be used to inspire others to get engaged to support your vision.
- This session provides an overview of a strategic planning process that can assist you to achieve this.
- Slides are deliberately detailed so you can share them with others if required.

Gain Context.

Effective planning requires a strong understanding of the context within which the association and its members operate.

Planning must be informed with clear data that provides deep insight into the current trends to ensure informed decision making.

Trends in both your sector and associations must be considered.

Additional Resource:
Visit www.smsonline.net.au
to download the Association
Apocalypse whitepaper.

Technology & Digital

- Impact of emerging technologies
- Marketing automation
- Fragmentation of communication
- Data informing evidence led decision making

Communication & Engagement

- Connection to Purpose
- Tangible Outcomes
- Personalised Experience
- Tribe and Community

Generational and Societal

- Generational Shifts
- Competitive Forces
- Evolution of Work
- Lifestyle Changes

COVID19.

The impact of COVID-19 must be considered in any strategic planning process.

Research has found the following areas to be critical considerations in a post-COVID-19 association planning consideration.

Common themes were the need for:

Additional Resource:
Visit www.smsonline.net.au to find out more about the research into the impact of COVID-19 onto associations.

Visionary Leadership

- Build a skilled board and senior leadership team
- Ensure nimble and adaptive decision-making.
- Adopt nimble governance practices
- Enhance reporting structures to ensure clarity and evidence-based decision making.

An Effective Team

- Upskill staff around technology
- Improve internal communications, processes, and systems
- Implement more effective work from home processes
- Have better collaboration with other associations

Financial Sustainability

- Diversify revenue streams.
- Build reserves

Maximisation of Positive Impact

- Ensure a modern membership structure that articulates and delivers member value.
- Invest in the technological solutions
- Have a diverse events portfolio of profitable online and offline events.
- Proactively engage and communicate with members
- Utilise a collaborative advocacy approach

Better Preparedness

- Better crisis planning.
- Larger stocks of mission critical goods

Action ... now.

Establish Clarity of Purpose.

It is impossible to identify a clear pathway forward without having an end-goal in mind.

Planning participants must have a practical understanding of participants of what “success” looks like – and what the role of the organisation is in creating that success.

This creates a lens through which all ideas can be evaluated.

VISION

- A great vision statement speaks about the positive outcome for your field or the sector if all your work was successful. It should be inspirational, clear, memorable, and concise.
- A world without Alzheimer's disease. (Alzheimer's Association)

PURPOSE

- A purpose statement is about why you exist
- We look after doctors so they can look after you. (British Medical Association)
- Sustaining Australia. (Australian Food and Grocery Council)

MISSION

- A mission statement provides clarity about what you do and for whom.
- To serve and represent members, enhance the legal profession in South Australia and to preserve the integrity of the justice system (Law Society of SA)
- To be the voice of the Australian food and grocery industry and a valued service provider to members. (Australian Food and Grocery Council)

MISSION & PURPOSE

- Many organisations often combine a purpose and mission statement.
- To improve the lives of vulnerable people by mobilizing the power of humanity in Canada and around the world (Canadian Red Cross)

Mission.

The mission provides a useful lens to ensure association activities are kept to those that align with the vision and purpose of the association.

The mission should broadly reference those activities that the planning team believe will align best to achieving the Vision.

You don't need to do everything. Focus on where you can make a powerful impact.

The broad types of association activities include:

Proactively exerting influence on behalf of members.

Delivering support directly to members.

(eg: products, services, publications, communications, events)

Building communities and facilitating connections between members.

Building the skills of members through education.

Advancing a cause shared by the collective.

Goals, Objectives & Strategies.

This is what you are actually going to do during the term of the plan.

A goal is not always required but can be helpful to focus (eg: merger, economic crisis, organisational financial crisis).

Your objectives are the 3-4 key things you must achieve over the time period to advance the vision.

Beneath these are 3-5 strategies and/or projects that will achieve that objective.

OBJECTIVE	STRATEGIES/PROJECTS
We will work with the government to ensure members are better positioned to navigate the post COVID-19 economic environment.	<ul style="list-style-type: none">• We will have planned infrastructure projects advanced early.• We will have mandated PPE requirements for our profession.
We will ensure members can access the services they need to build their career/business.	<ul style="list-style-type: none">• Identify the top 3-4 services required by key segments.• Ensure we provide these to a high standard.• Proactively engage segments with those services.
We will facilitate a strong member community that enables members to connect directly for mutual benefit.	<ul style="list-style-type: none">• Identify the key benefits for members from a community.• Implement required technology and staffing to achieve these.• Launch and drive the community online and offline.
We will build the skills of members at all career stages to enhance their ability to attain success.	<ul style="list-style-type: none">• Identify the skills required by members at each career stage.• Develop quality programs that reflect these.• Launch and ensure ongoing refinement and improvement.
Ensuring the operational enablers are in place to for the association to effectively and sustainably achieve its vision.	<ul style="list-style-type: none">• Undertake a review to ensure best- practice governance.• Foster a skilled staff and a nimble, positive culture.• Maximise personalisation by gain an excellent understanding of our market segments and embedding in communications.• Implement reporting structures that enable evidence-based decision making at all level of the organisation.• Implement processes and technology that will streamline operations and enhance member outcomes.• Ensure organisational sustainability by enhancing the business development capacity of the organisation.

Structure.

A strategy-to-a-page format provides a logical structure that ensures discussions are kept strategic and aligned to purpose.

Timeframe of Plan

What is the duration of this plan?

Vision

What is the vision of the association?

Mission and/or Purpose

What is the mission and/or purpose of the association?

Values

What are the values (only include this if you are prepared to embed these into your operations)

Goal

Do you have an overarching goal to achieve over the timeframe of the plan? This step isn't always necessary.

Objectives

1. Objective 1
 - Strategy 1
 - Strategy 2
 - Strategy 3
 - Strategy 4
2. Objective 2
 - Strategy 1
 - Strategy 2
 - Strategy 3
 - Strategy 4
3. Objective 3
 - Strategy 1
 - Strategy 2
 - Strategy 3
 - Strategy 4

Measurability.

Every goal, objective, strategy and project MUST have a measurable goal.

To get this answer the questions:

1. "How will I know when it is done?"
2. "How will I know if the result is good, bad, or average?"

Goals within the strategy must be measurable, realistic, and time dependent.

You can use your data to test have realistic your targets are. For example, say you want to set a target of **3,000 members by 2023** ...

Say your best EVER retention was 90%, your best yearly new members was 250, and you had 2,100 members as at December 31, 2020. Let's forecast what happens if you equalled your best ever performance for three years straight ...

- By Dec 31, 2021, you would have 2140 members $((2100*90%)+250)$
- By Dec 31, 2022, you would have 2176 members $((2140*90%)+250)$
- By December 31, 2023, you will have 2208 members $(2176*90%)+250$

There is NO WAY you could achieve that target unless you are going to fundamentally change the way you operate.

ASSOCIATION ANNIE



Implement.

Once finalized the strategy must be operationalized with an implementation plan that will enable those implementing the strategy to have a clear understanding of the tasks required to implement.

Mapping the implementation plan on a Gantt chart is a useful way of ensuring the allocation of the workload, and the ordering of tasks, is realistic.

- Objective
 - Strategy
 - Tasks
 - KPI
 - Status
 - Responsible Person
 - Gantt Chart

QUESTIONS?

SMS CAN ASSIST (REMOTELY) WITH

- *Strategy Assistance*: Including Strategic Plan Development Facilitation and Association Health Checks.
- *Membership Assistance*: Including Membership Strategy Development and Membership Health Checks.
- *Sponsorship & Partnership Assistance*: Including Sponsorship Health Checks and Sponsorship Coaching.

Belinda Moore

Phone: 0413 190 197

Email: belinda@smsonline.net.au

LinkedIn: [belindaamoore](#)

E-News: Subscribe at
www.smsonline.net.au

WANT MORE
ASSOCIATION-
RELATED VIDEOS?

www.answers.net.au