



INTERSOL Heuristix

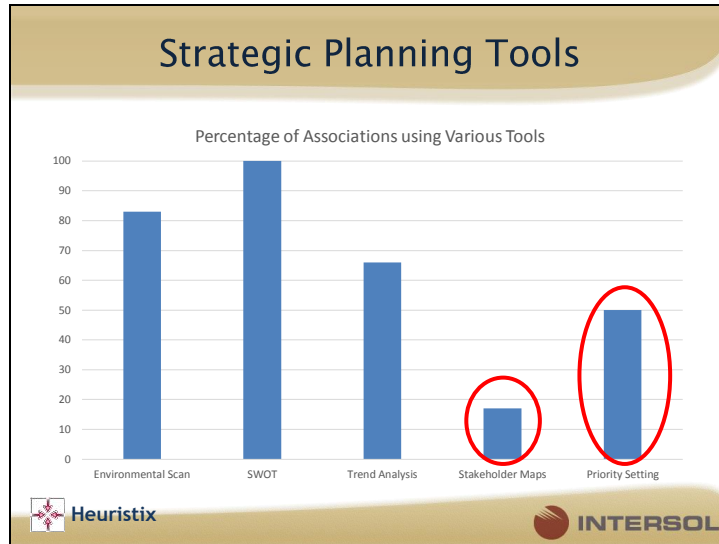
Strategic and Operational Excellence

Aligning Strategic, Operating and HR Plans

The slide features a header with the 'INTERSOL' logo on the left and the 'Heuristix' logo on the right. Below the header is a photograph of four business professionals (two men and two women) in an office setting, leaning over a table and looking at a laptop. The main content area has a light beige background with the title 'Strategic and Operational Excellence' in bold black text, followed by the subtitle 'Aligning Strategic, Operating and HR Plans' in a smaller black font.









Key elements to a **Strategic Plan**

- Mission (Self-interest/Public Interest)
- Vision
- Values
- High-level Goals (Objectives)

Strategic plans differ from Operating Plans.
They must create the environment and culture
upon which annual operating plans find their
raison d'être

Operational Planning

- Clearly Articulates **Outcomes** that are aligned with the Strategic Plan
- Outcomes are populated with specific **Outputs** designed to be measurable
- Operating Plans Must include a priority assessment tool and be tied to available resources

Planning Tools

- Member surveys (Survey Monkey etc.):
 - H2 manage low response rates
 - H2 avoid repeating the current plan
- Online facilitated discussions
- Town Halls (live or online)
- Environmental Scanning
- Stakeholder Mapping
- Trend analysis

Planning Tools

Getting input from members and KOLs

- **Mix it up.**
 - Survey fatigue
 - Low response rates
 - Low motivation (unless there is a crisis)
 - Lack of time
- **Make it exciting**
 - Facilitated space (open space etc.)
 - Gameification

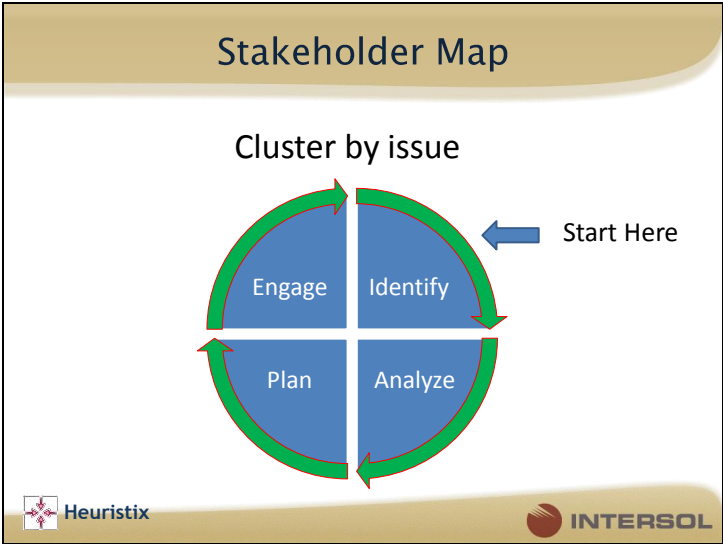


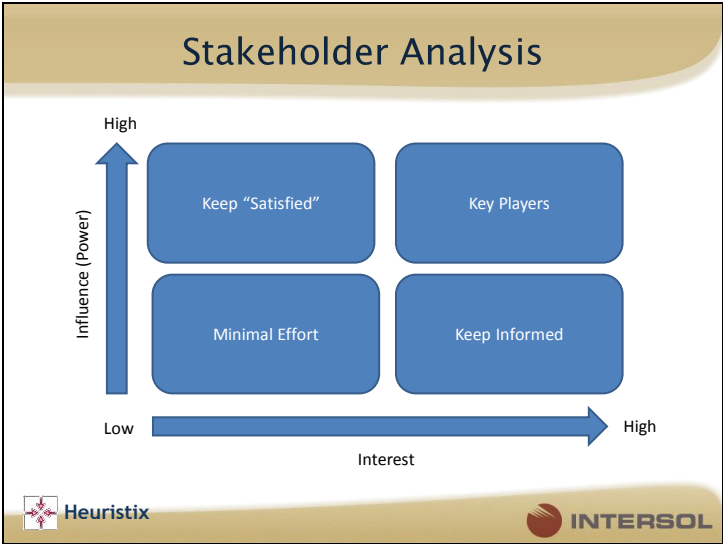
Planning Tools

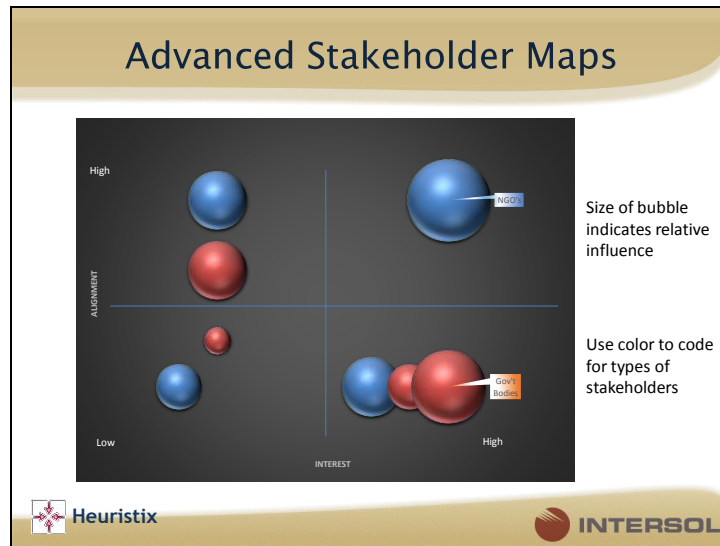
Environmental scanning (Trends Report)

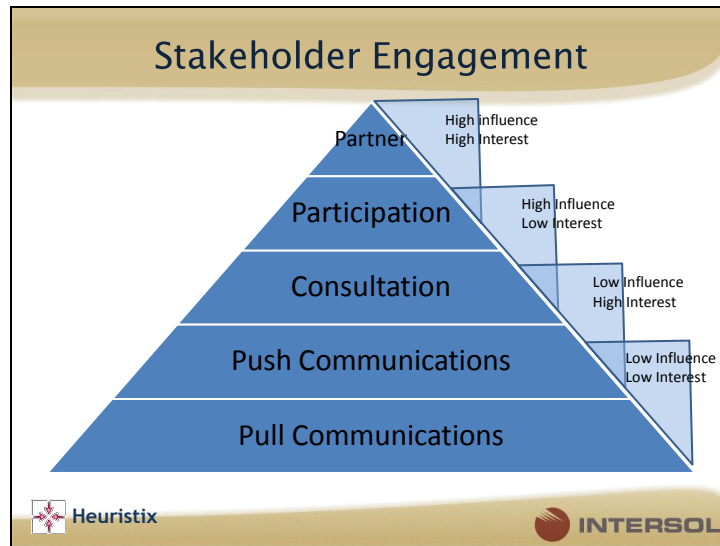
- Trade publications
- “Media” Monitoring
 - Subscribe
 - Google
 - RSS aggregation (e.g. Feed Demon)
 - Twitter
- Government agendas
- Apportion scanning, assess and capture on the fly





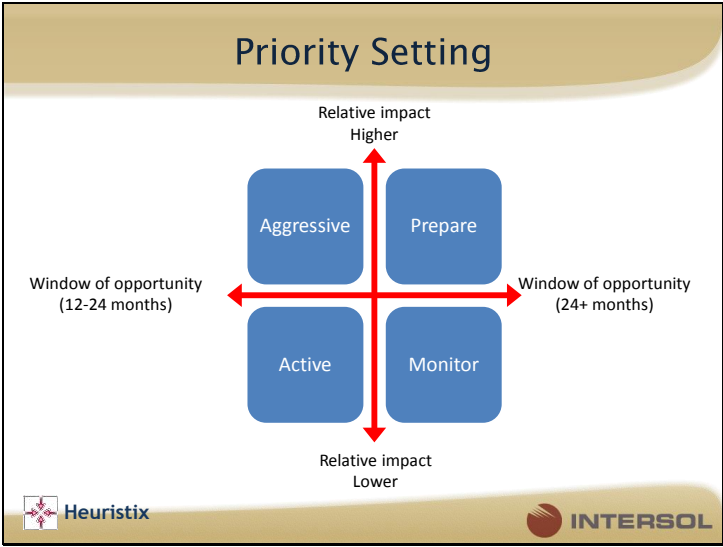






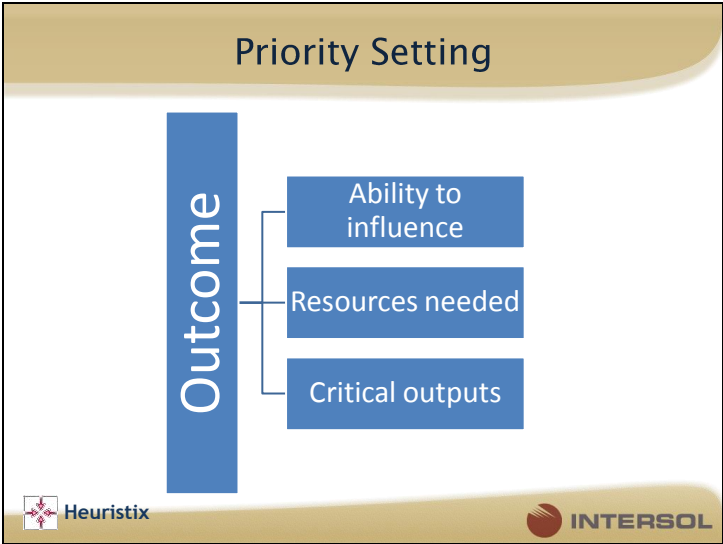
Priority Setting

- Simple polling (e.g. dots)
- Adding to current programs
- Zero-based
 - Every year all outcomes are assessed
 - Need for objective analytical tool
 - Resource assessment





Priority Setting

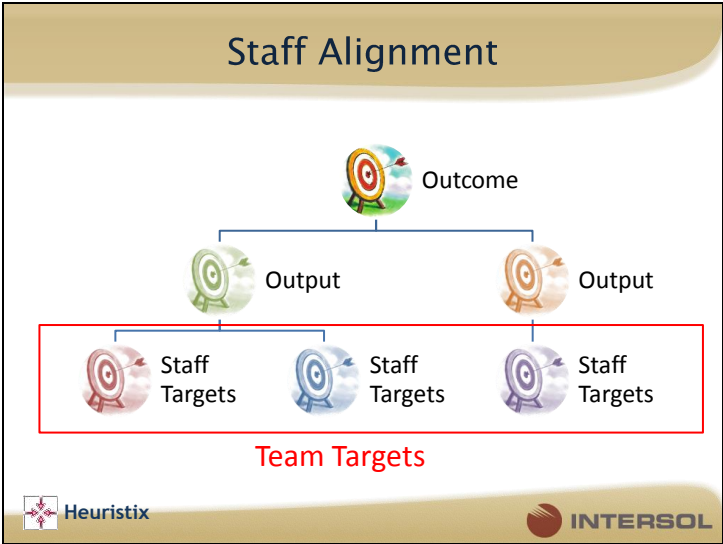
- Determine the distribution of resources strategically. For example:
 - Aggressive – 60%
 - Active – 20%
 - Prepare – 15%
 - Monitor – 5%
- Estimate resource capacity for each issue
- Establish cut-off. Get Board agreement



Staff Alignment

Type of Plan	Pros	Cons
Retrospective		
Percentage of pool		
Combination of individual and organizational		
Combination of individual and small team		
Prospective based on association outcomes and individual outputs		
Other		

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Putting it all Together

- Strategic plan sets the Mission, a vision of a better environment for members (and public), the big picture goals (objectives) and values (culture)
- Operating plan sets Outcomes needed to move the yardsticks on the strategic goals and outputs anticipated
- Staff alignment plan ties resources to the priority outcomes



Thank You

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