



Jim Wert

THE ROLE OF STRATEGIC EVALUATION

Guiding ministry growth through regular strategy reviews

A Strategic Plan **MUST** Be a 'living' Tool

THIS MEANS CONTINUOUS REVIEW, ADAPTABLE LEADERSHIP

- Your context is always changing, and the pace is quickening
- Your priorities will change over the lifecycle of your plans
- God may have better things in mind



Adaptability and Paul's 'Gospel to the Gentiles Ministries, Inc.'



"Immediately we sought to go into Macedonia, concluding that God had called us to preach the gospel to them."
Acts 16:10

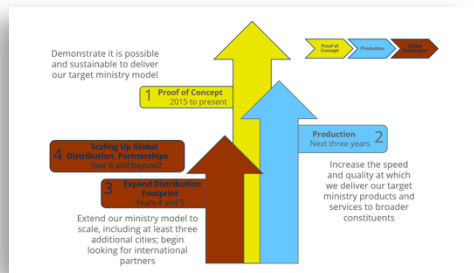
When Should We Update Our Plans?

POSSIBLE TRIGGERS

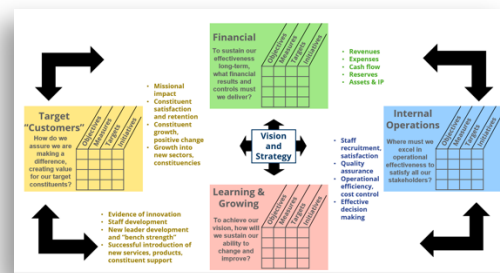
- **Ministry-altering events**
"The government just shut us down..." (Russia, Hong Kong)
- **An emerging new opportunity**
"Digital content and short-form video is the future..." (from print to screen, the rise of social media)
- **Results that are exceeding, or lagging behind, expectations**
"These survey results say our ministry events will never have the impact we want..."
need to rethink everything)
- **Time**
"Our Board and our donors are asking for an update..." (taking a proactive view)



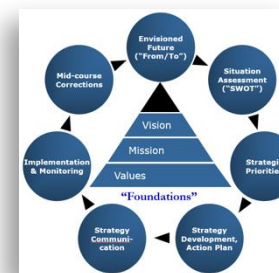
Important Tools for Keeping Your Strategy On Track



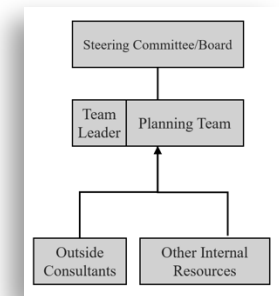
A Strategic "Roadmap"



Metrics and Dashboards



A Regular Rhythm for Review



An Accountable Owner of the Review Process

Diving Into Details

A CONVERSATION ON EXECUTING
AND UPDATING YOUR STRATEGY

What Are the Objectives of a Strategy Review?

ANSWERING IMPORTANT QUESTIONS

1. Where are we making real progress? Where are we struggling?
 - What should we be celebrating, and how?
 - What have we learned, and what do we need to fix?
2. Are we still working on the right priorities?
3. Do we have the right people working on the right things?
4. Are urgent things (“fire fighting”) crowding out important things?

Is it time to update our plan?

- A light edit?
- Some new elements, sections?
- A complete overhaul?

The Tyranny of the Urgent*

	URGENT	NOT URGENT
IMPORTANT	<p><u>Quadrant I</u> <i>urgent and important</i> DO</p>	<p><u>Quadrant II</u> <i>not urgent but important</i> PLAN</p>
NOT IMPORTANT	<p><u>Quadrant III</u> <i>urgent but not important</i> DELEGATE</p>	<p><u>Quadrant IV</u> <i>not urgent and not important</i> ELIMINATE</p>

* Charles E. Hummel

How Frequently Should We Review Our Strategy?

IT DEPENDS...

- At least once a year, part of a regular cycle for your leadership team and Board
- More frequently if your context, environment is changing rapidly – once every three months?
- Immediately should one of those “trigger events” happen

What Should Be Our Approach for a Strategy Review?

TWO CHALLENGES THAT MAKE THIS HARD

1. Finding the right balance between the “forest” (the Strategy) and the “trees” (the Tactics)
2. Grounding the review on facts, versus assumptions and impressions

How Do We Prepare for a Strategy Review?

KEYS TO SUCCESS

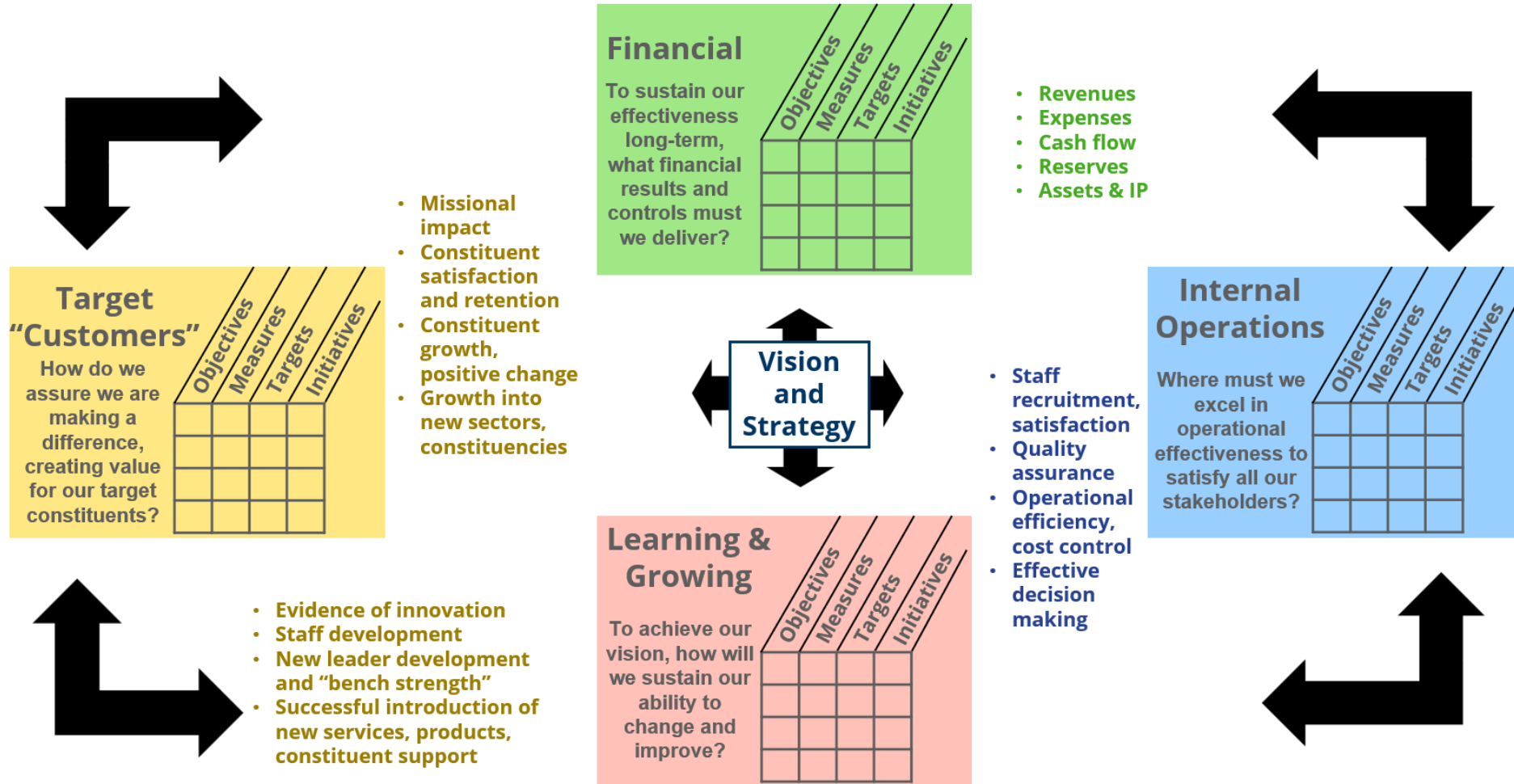
1. Gather the facts

- Data connected to specific strategic goals and objectives
- Data considering everything that's important (a "Balanced Scorecard")

2. Get the right people in the room

- The strategic thinkers
- The decision makers
- The leaders responsible for executing the strategy

A Balanced Scorecard for Strategy Execution



What If We're "Stuck"?

CONSIDER FOCUSING ON YOUR "ONE BIG THING"

"Every organisation, if it wants to create a sense of alignment and focus, must have a single top priority within a given period of time... a rallying cry, a single area of focus around which there is no confusion or disagreement."

Patrick Lencioni - The Advantage

Creating Our “Rallying Cry” Or “One Big Thing”

CAN WE ANSWER THESE QUESTIONS?

“If we accomplish only one thing during the next x months*, what would it be?”

“What must be true x months from now for us to be able to look back and say with credibility that we had a good period?”

The Advantage

* Likely somewhere between 6 and 12 months

Some “One Big Thing” Examples

- ❑ Successfully complete a leadership transition for a key organisational role
- ❑ Close the gap on revenues versus expenses, either through generating more income/donations, and/or through reducing expenses
- ❑ Complete a move into a new facility
- ❑ Expand the ministry footprint into a new territory or target constituency/segment
- ❑ Finalize a significant partnership agreement, merger, or acquisition
- ❑ Launch, pursue, and complete a ministry pilot program that lays the groundwork for future long-term growth
- ❑ Secure significant funding support from a new Foundation and/or major donor
- ❑ Integrate a significant new system or technology into the ministry model





LIVE LEARNING
with a specialist