

Building a business plan fit for our times



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Some simple tools to help you with your planning

Getting started...

The purpose of your business plan

Our operating context

Competitor analysis

Reflecting and refining



Getting started...

- Post-its, mind mapping and pictures are all possible ways of capturing thinking.
- Work fast & limit the time on this (eg less than 30 mins). If it's more than a page there's probably too much, so it's definitely worth thinking what might it be taken out or simplified. Keep the notes!
- **Focus on the purpose...** why are you writing your business plan at this time... is it to galvanise, re-shape, prioritise, or cohere?
- **Who is it for?** In rapidly changing environment is the priority your staff, your stakeholders, your funders or partners. Try and go beyond general categories eg 'our staff' and picture individuals/smaller groups of individuals to help bring colour and detail to the range of needs and expectations. Can we ask our readers what they need rather than make assumptions?



Getting started...

- **Timescales** - define the length of plan period that works for your organisation, but think about iteration and breaking it down into cycles. What will be fast and good enough, rather than a 'full glory' version? What is *driving* your timeline (dependencies on others, government guidelines, term times etc) and what might *constrain* it (capacity / resources probably).
- **Roles** - break this down if appropriate to trustees, SMT, wider staff teams, furloughed staff. What might constitute training activity (professional development) for furloughed staff? Do we need to keep others 'in the loop' as we go? Identify when the moments are for ideas/generative thinking and when/who makes decisions. Can we use quick methods of team voting/ranking (more than normal) to test for alignment as we go?
- Remember this is for *this* iteration of the plan. We have the opportunity to revisit these in the next cycle and change the emphasis if needs be..



The purpose of your business plan

1. Identify the key people you need to work with on this.
2. Agree on the purpose of your business plan
3. Identify the range of stakeholders
4. Set out the timescales and review cycles
5. Roles - who is doing what, by when.

Our purpose – what realistically do we mean to achieve with this plan? What can we achieve through the process as well as the output?	Our readers – who are they, what kind of output will they need?
What kind of timescales make sense to us for producing this?	What roles will our colleagues have in creating this plan, how can we accommodate different needs and what kind of process makes sense?



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With short-term clarity about our current financial position we are re-shaping our cultural offer for the next 6 months to ensure we continue to connect with audiences and communities whilst we are unable to open our building.
An opportunity to connect with and listen to members of our team and community stakeholders.

All members of staff - furloughed and non-furloughed.
Clarity and reassurance re job security for the next 6 months.
Clear vision for our cultural offer and how they as individuals and teams contribute towards the plan

What kind of timescales make sense to us for producing this?

What roles will our colleagues have in creating this plan, how can we accommodate different needs and what kind of process makes sense?

Comms to stakeholders 19th May
Community Forum 22nd May
Draft plan to stakeholders by end of May.
Approved plan to all staff and trustees 9th June.
Review monthly.
Second iteration of plan proposed December 2020

Senior Management Team to produce the plan.
Finance Manager to provide financial outlook.
Communication Manager to create and deliver comms to include team briefings, polls etc
Engagement Officer to liaise with key community contacts and partners
Chair to engage board members in the process
Chair to sign off final plan

Our operating context

There is a lot of uncertainty at this time. There are however some things that we can be more confident about.

What are the 'assumed truths' that you are taking into consideration when creating your business plan.

There is a wealth of research, ideas and insights online that might inspire and inform your thinking. We've created this document based on information we've found:

<https://docs.google.com/document/d/1qOFZZauJahgL-vBaHPirn8xGmiOlxBwz8xkPhLAVOFk/edit?usp=sharing>



Our operating context

1. Identify your 'assumed truths'. You could do a force-ranking exercise or vote amongst your team to thin the list out and focus down.
2. Choose a small number that are most relevant (e.g 3-5, no more) to examine more closely and formulate a response.
3. Think about opportunity, careful management, or material changes in approach.
4. Avoid the temptation towards narrative - set a word limit (100 words max)

These are the assumed truths we're focussing on	Our response as an organisation is...
Workplaces and practices will need to be modified	
People will have less disposable income	
There has been a big shift to digital	
People have developed a new familiarity with their neighbourhood	



Our operating context

These are the assumed truths we're focussing on...	Our response as an organisation is...
Workplaces and practices will need to be modified	To assume phased return of staff by mid Sept Office layout to sort – opportunity to implement access changes we've been thinking of. Sort cleaning, waste & check ventilation
People will have less disposable income	Not to cut our prices back (can't afford to); strategy is to ensure great quality instead. Focus on returning customers. Cross subsidise concessions.
There has been a big shift to digital	To pay more attention to flow between online & offline interactions. Consider digital alongside live from the beginning with new projects
People have developed a new familiarity with their neighbourhood	To build on our 3 strongest community partnerships & prioritise communicating our local impact



Our operating context

These are the assumed truths we're focussing on	Our response as an organisation is...



Our competitor analysis

This is about scanning to see who else is offering similar things to us or trying to engage the same people. We want to end up with a clear idea of:

- Whether there is a gap in the market our organisation could fill
- How much effort to invest in making our offer different or better so that people choose to give us their time, attention or money
- Whether there is scope for us to collaborate instead of compete



Our competitor analysis

Think about competitors in the different categories. It might make sense to pick just one 'line of business' e.g. recorded performances or virtual workshops.

Pick a few (or just the main) competitor and jot down what you know about their offer. The 4 Ps is a simple framework for this. (explanation of the P's [here](#))



Our competitor analysis

1. Work with your team to identify the competitors
2. Research their offer using the 4Ps framework
3. What opportunities does this create? Is there a gap in the market your organisation could fill? How much effort will you need to invest to make your offer different or better? Is there scope for collaboration rather than competition?

Price	Product	Promotion	Place
			

Our competitor analysis - Museum of X

Price	Product	Promotion	Place
free; donation request on landing page – 5 clicks to donate.	virtual tours; access to collections via thumbnail images; weekly blog re object directed at adults weekly kids suggested activity (with 2 page downloadable resource) No 'behind the scenes' content like ours, no youth content Shop still open online (not obv from landing page)	featured in paper. social media. Topical social media posts, focus on promoting blogs & items of interest. Intermittent other calls to action (eg take part in our quiz).	online content, building closed, no mobile outreach. Google ad for shop.

Conclusions: offer skewed towards informed adults. Kids activity available but not heavily promoted & nothing for young people. Makes giving & spending on shop items easier than we do. Could we signpost each other's offer better?



Some final checks... Is your business plan fit for our times?

- Is it for a shorter term? (3 - 6 months, not years)
- Is it iterative with scope for testing, learning, revising?
- Is it clear and concise, focussing in on next key issues, rather than trying to solve everything at once?
- Is it quick to absorb and update?
- Are your mission, vision and values the scaffolding for your plan?
- Does it focus on the 'how', considering reconfiguration, innovation and letting go?
- Have you considered partnerships and novel alliances?
- Have you consulted, engaged and collaborated with your staff / trustees as much as is feasible?



...more free resources,
support and tools

changecreation.org

peoplemakeitwork.com

