

# Building a business plan - implications of a changed approach



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# New plan, new ways of working

- This tool is to help work out what the implications of a changed approach to business planning means for how you work with your trustees and staff
- It refers back to the principles we suggested in the first business planning tool
- You can use it to support an expectation-setting conversation with your staff and board
- It can also prompt more practical decisions about who sees what, when and in what format



# Using this tool - some prompts

Using the matrix, think about the implications of this new approach to business planning for your teams and trustees. It might help to think about

- Reporting & meeting cycles
- Managing expectations & concerns
- Making the most of individuals' skills and time
- Managing performance – objectives, competencies & values
- Reviewing some standard business processes
- Use of online project management tools to manage version control whilst allowing access & input
- Remember at the end to circle just 3 priorities!

BUSINESS PLANNING PRINCIPLES NOW	WHAT IT MEANS FOR OUR STAFF	WHAT IT MEANS FOR OUR TRUSTEES
Shorter term horizon		
Iterative		
Brevity and clarity		
Mission, vision, values still key		
Reconfiguration, innovation and letting go		
Partnerships and novel alliances		
Engagement & collaboration		



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EXAMPLE		
PRINCIPLES NOW	WHAT IT MEANS FOR OUR STAFF	WHAT IT MEANS FOR OUR TRUSTEES
Shorter term	Need to adjust appraisal goals & meetings to match cycle May feel less secure – reinforce cycle idea.	Quarterly meeting cycle too slow – could use sub-committee/working group but ideally take all board with us in thinking
Iterative	Requires constant updating & staying in the loop. Need to keep working notes. One pager important. Will use Google docs to capture comments & help version control. 'Always on' may be hard to start with.	Allow access to same docs. Get used to sharing the rough drafts rather than finished product. Set understanding of 'good enough'. Need to ask different questions for different iterations.
Brevity and clarity	We tend to use lots of words so new discipline to strip back. Maybe try 140 characters exercise. John good at drawing – can he do one page model?	Trustees to exercise discipline in asking for stuff/adding in. Need to help strip back instead. And keep coherent.
Mission, vision, values still key	Think all on board with M&V, but should be on virtual notice board (trello?). Reminder that values apply to how we create plan too.	Can help keep Mission, Vision and Values as our 'true north'.

## EXAMPLE... continued

PRINCIPLES NOW	WHAT IT MEANS FOR OUR STAFF	WHAT IT MEANS FOR OUR TRUSTEES
Reconfiguration Innovation and letting go	Opportunity to use collective experience & ideas in reconfiguring (exciting). 'Pet projects' mindset held by some might become problematic. Tough to manage letting go though. Some staff struggling with change on too many fronts at once.	May have to make tough choices. Some have greater appetite for risk (not chair though) – need discussion about this. True North point again – role in checking there is no mission drift.
Partnerships and novel alliances	Everyone's networks count (not just usual ones.) How to encourage this thinking?	Worth re-examining trustee networks to see if new relationships can be brokered. Trustees deployed to help build new alliances. Ask trustees to check we are clear on the give/get.
Engagement & collaboration	Could adopt a 'project teams' approach – building on our work to date to get away from silos. Don't forget associates! Need plan for furloughed staff (change in June?) Set out timeline & no rushed deadlines – people working slower & at different times of day.	Board don't know some staff very well – maybe a few trustees could work with 'project teams' on a task & finish basis?

# Business plan cycle

- This map aims to help create a concept of the overall process for your business planning, such that you can share it with staff and trustees.
- It places more emphasis than might have been the case before on what you are discovering and learning. Resource allocation has to come sooner in the process because of the shorter time-frames.
- You can also use the boxes to guide the business plan content itself (as in the worked example). If you manage it, it will give you a plan on a page!
- The tool package includes an overview of the cycle, a worked example of a (very simple) business plan on a page, and further explanation of what each box might cover.



# The business plan cycle





# Prompts for thinking about your business planning cycle

## FILTERS

Mission, vision,  
Values

External  
environment

Financial & other  
internal  
constraints

## PRIORITIES

Greatest needs

What to do  
What not to do  
What first?

## RESOURCE ALLOCATION

Deploying assets  
(how much, to  
what)

People, money,  
partnerships etc



# Prompts for thinking about your business planning cycle... continued

## OFFERS

Continued offer

New/  
reconfigured  
offer

Letting go/  
pause

## QUESTIONS

Are the  
features right?  
Can it work in  
practical terms?  
Does this pay  
structure work?

## DELIVERY

Timeline

Deployment of  
resources

Managing risk



# Prompts for thinking about your business planning cycle... continued

## Audience experience

How are they behaving?

What are they telling us?

Cycle may start here!

## Results

What answers did we get to our question(s)?

## Learning

Did we achieve goal?

Unintended outcomes?

How did we go about it?

What does this all mean?



# Example - business plan cycle



More tools and resources available at  
[www.changecreation.org](http://www.changecreation.org)  
[www.peoplemakeitwork.com](http://www.peoplemakeitwork.com)

