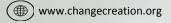
# Building a business plan - implications of a changed approach







### 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**

Shorter term

**Iterative** 

Brevity and

Mission, vision,

values still key

clarity

WHAT IT MEANS FOR OUR STAFF

match cycle

version control.

Need to adjust appraisal goals & meetings to

May feel less secure – reinforce cycle idea.

'Always on' may be hard to start with.

apply to how we create plan too.

Requires constant updating & staying in the loop.

Need to keep working notes. One pager important.

Will use Google docs to capture comments & help

We tend to use lots of words so new discipline to

John good at drawing – can he do one page model?

virtual notice board (trello?). Reminder that values

strip back. Maybe try 140 characters exercise.

Think all on board with M&V, but should be on

WHAT IT MEANS FOR OUR TRUSTEES

board with us in thinking

And keep coherent.

'true north'.

Quarterly meeting cycle too slow – could use

sub-committee/working group but ideally take all

Allow access to same docs. Get used to sharing

understanding of 'good enough'. Need to ask

different questions for different iterations.

Trustees to exercise discipline in asking for

stuff/adding in. Need to help strip back instead.

Can help keep Mission, Vision and Values as our

the rough drafts rather than finished product. Set

Everyone's networks count (not just usual ones.)

How to encourage this thinking?

relationships can be brokered. Trustees deployed to help build new alliances. Ask trustees to check we are clear on the give/get.

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

Set out timeline & no rushed deadlines – people

working slower & at different times of day.

(change in June?)

held by some might become problematic. Tough

struggling with change on too many fronts at

to manage letting go though. Some staff

relationships can be brokered. Trustees deployed to help build new alliances. Ask trustees to check we are clear on the give/get.

Board don't know some staff very well – maybe a few trustees could work with 'project teams' on a task & finish basis?

discussion about this. True North point again – role

in checking there is no mission drift.

Engagement & collaboration

Partnerships

and novel

alliances

letting go

**EXAMPLE...** continued

### **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

Filter: Our mission and vision are...

Our community has been one of the hardest hit by C19. Many are not able to take advantage of digital. A few orgs are looking for workarounds – we want to collaborate not compete

**Priorities:** Sustaining a relationship is key for our audiences and for us.

We need to develop partnerships with people who can help with reaching people on the ground.

Resource Allocation: We can use revenue grant towards these projects & will link to individual giving campaign.\* attach budgets

Jo & Jenny will move to working on this.

We are offering A use of our building as part of partnership development.

Offers: We will prepare one digital offer to post up that needs low data to use

We will work with A &B to create a new non-digital offer

We are pausing Project X

Questions: To what extent is our digital offer reaching our core audience?

How will we make our partnership offer work on the ground?

What features must it have?

Delivery: Digital offer: live by end of May. Campaign to mid June & data collection to end July.

A&D Partnership MOU & plan by mid June, look to launch by Sept

Audience Experience: Make channels clear for audience support & agree our response times

Plan calls for action (eg referral, repeat)

Make sure people have means to feedback

What is not happening?

Results: Fortnightly data review digital offer & final data tally early Aug

Social media scan fortnightly & review

UX test group for non digital offer – post card responses

Critical incident review with partners

Learning: Learning journal for project leads

Weekly staff meetings

Organisation wide zooms to assess results & feedback after Sept launch & in October



CHANGE CREATION

More tools and resources available at <a href="https://www.changecreation.org">www.changecreation.org</a> <a href="https://www.peoplemakeitwork.com">www.peoplemakeitwork.com</a>

