

Welcome

In another tab in your browser or another device, type the following URL: **sli.do**

Enter event code: **39114**

Type in a single word to answer the following question:

If you had to describe how you are feeling in one word, what would it be?

Strategic Planning Team



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Agenda

Session #1

Welcome & Introductions - 30 mins

- Session Objectives
- Small Group Introductions

Module 1 – Strengthening Your Approach - 45 mins

- Hedgehog & Flywheel Concepts
- SWOT Analysis

Module 2 – Refining Your Strategy - 45 mins

- Strategy on a Page
- SMART Goal Setting
- 2x2 Prioritization Matrix

30 Minute Break

Module 3 – Understanding Issues - 45 mins

- Root Cause Analysis
- Fishbone Diagrams / The 5 Whys

Wrap Up - 15 mins

Agenda

Session #2

Welcome - 15 mins

- Recap & Reflect on Day 1
- Workshop 2 Objectives & Terminology

Module 1 - 45 mins

- Scenario planning
- Pest Analysis

Module 2 - 45 mins

- Contingency Planning
- Business Continuity Planning

30 Minute Break

Module 3 - 45 mins

- Succession Planning
- 9 Box - Action Plan

Wrap Up - 15 mins



Tools

Slido

URL: **sli.do**

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Padlet

URL:

<https://padlet.com/t4tadmin/oqj3nt69pu0zoze4>

Zoom

Chat

Reactions (thumbs up, applause, etc.)

Breakout rooms

Additional Guidance for Zoom

- Mute your microphone when not speaking to prevent echoes/background noise. Video uses more Zoom bandwidth.
- All voices matter and everyone will be given an opportunity to speak. Please make room for the quieter people.
- When possible, keep remarks brief so we cover the material as scheduled.
- Use Zoom's Chat function for questions/comments. Hover the mouse near the bottom of the Zoom window to display Zoom buttons.
- The moderator may ask you to give a “thumbs up” reaction at some points.
- There will be a “parking lot” for items that we would like to return to later.
- This presentation, along with additional resources / templates, can be found on the following site: <http://www.rainforesttrust.org/capacitybuilding/>

team4tech



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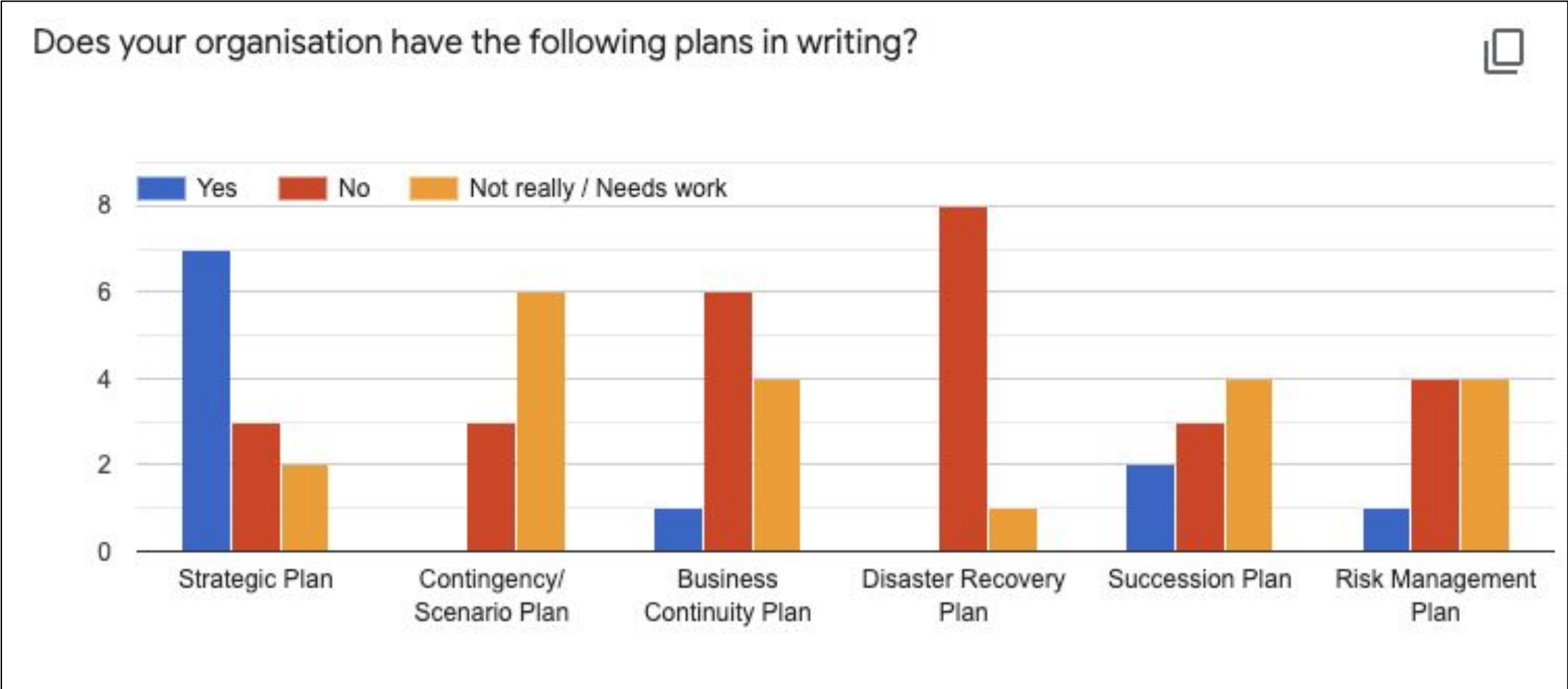
Survey Highlights

Almost 80% have a defined or measured strategic plan



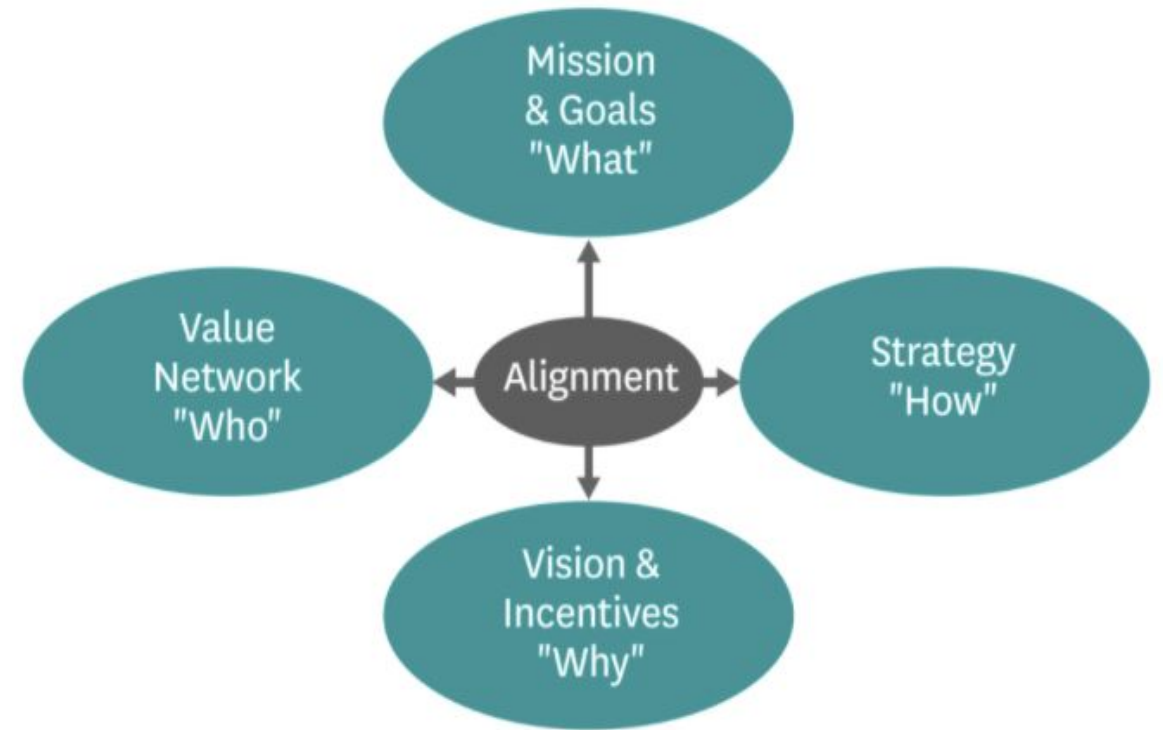
Survey Highlights

Some key components are not yet in written form



Strategy - A Definition

A set of guiding principles that, when communicated and adopted in the organization, generates a desired pattern of decision making to achieve the organization's objectives.



Alignment through Strategic Planning

What?

- Provides management roadmap to align organization's activities to achieve specific goals
- Guides management discussions and decision making
- Help determine resource and budget requirements

Why?

- It establishes a direction for your organization
- It helps your organization focus so you can develop the right goals and help everyone focus on meeting those goals

Our Vision:

Our Mission / Purpose:

Our Values:

Strategic Pillars

Strategic Focus Areas

Objectives / Goals



Success Measure(s): _____



Success Measure(s): _____



Success Measure(s): _____

By the end of the Strategic Planning Day 1 Workshop, you will be able to:

Understand basic tools and frameworks used to create and strengthen a Strategic Plan.

SWOT Analysis

SMART Goals

Your “Hedgehog” Concept

2x2 Prioritization Matrix

The 5 Why’s & Fishbone Diagrams (Root Cause Analysis)

By the end of the Strategic Planning Day 2 Workshop, you will be able to:

Understand advanced concepts used to strengthen your Strategic Plan:

Scenario Planning

Contingency Planning

Business Continuity

Pest Analysis

Succession Planning

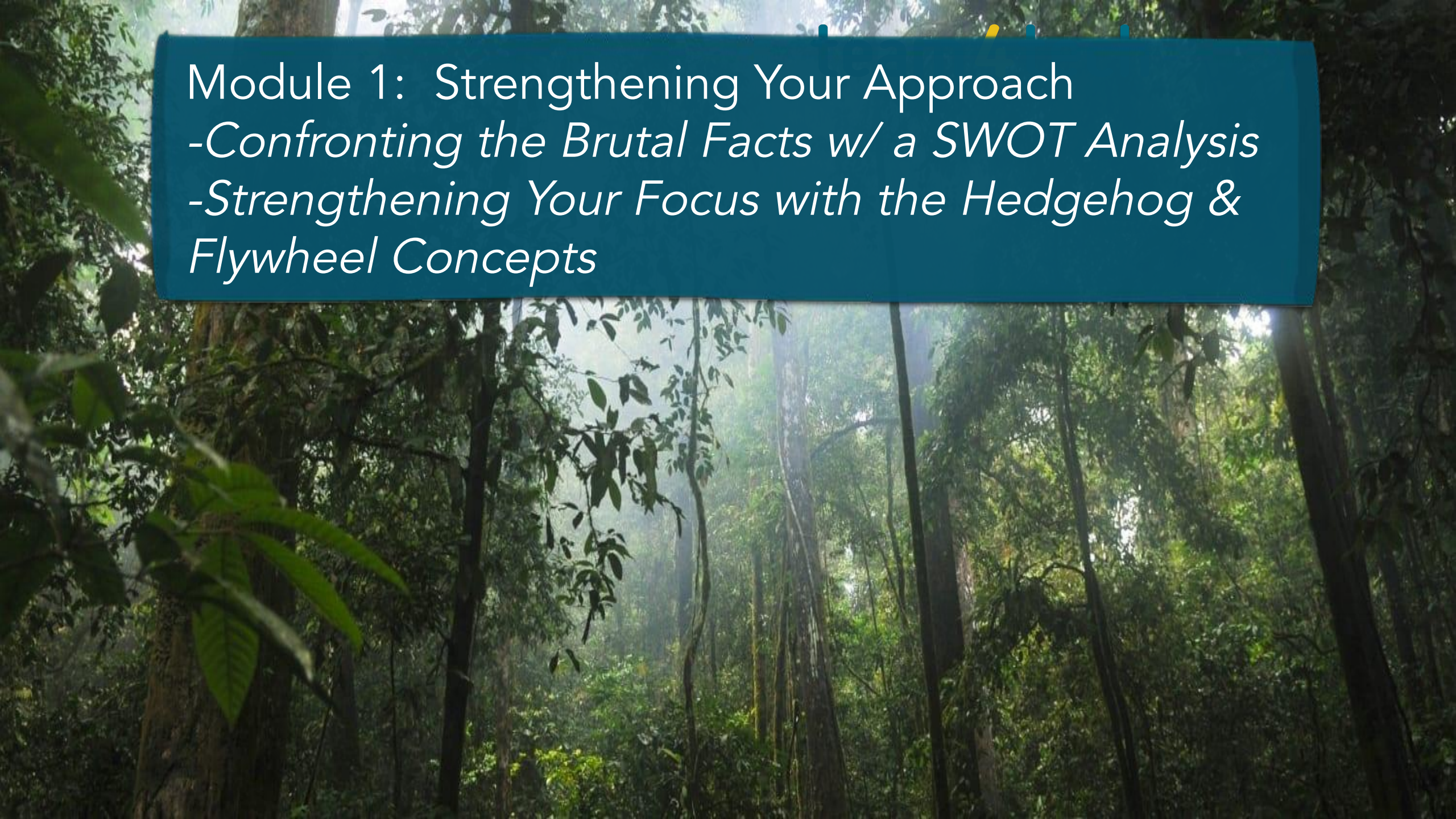
9 Box Action plan

Breakout Group #1 - Introductions – 10 mins

1 - In your breakout group, please share your name, where you are located, your organization, and the mission & vision for your organization.

- *Vision - A description of the world as it would exist if the organization were to succeed in achieving its grandest aspirations.*
- *Mission - A succinct expression of an organization's essential reason for existence or core purpose.*

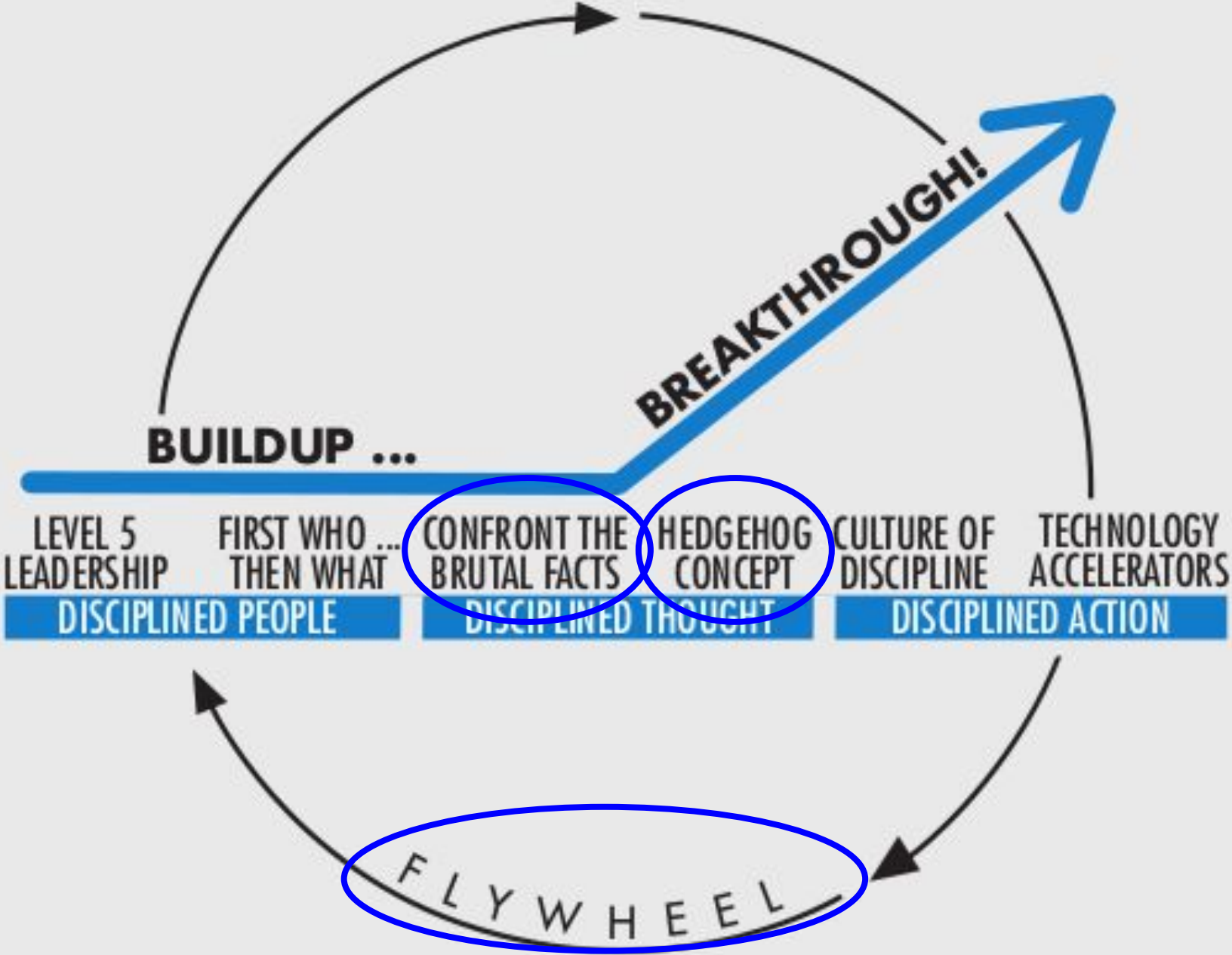
2 - Time allowing, please share one of your organization's major objectives or goals for the next year.



Module 1: Strengthening Your Approach

- Confronting the Brutal Facts w/ a SWOT Analysis*
- Strengthening Your Focus with the Hedgehog & Flywheel Concepts*

Going from Good to Great



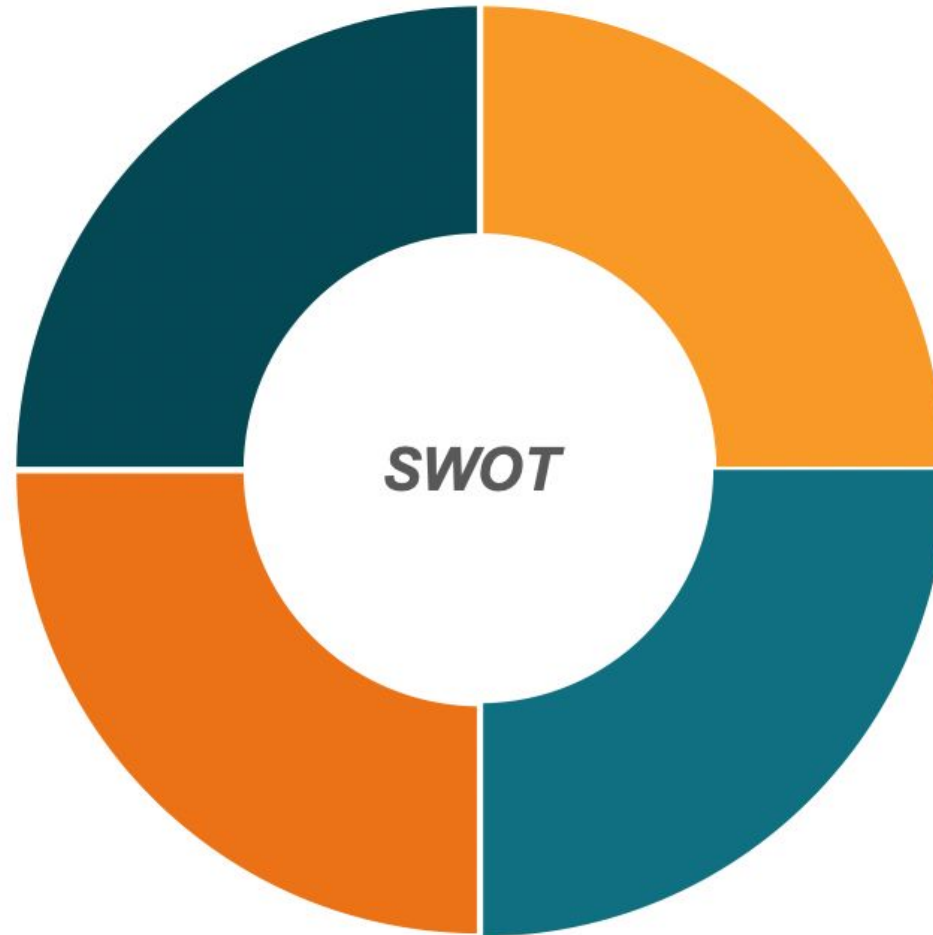
Confronting the Brutal Facts - SWOT Analysis

STRENGTHS

- Advantage
- Capabilities
- Assets, people
- Experience
- Financial reserves
- Value proposition
- Price, value, quality

OPPORTUNITIES

- Areas to improve
- New segments
- Industry trends
- New products
- New innovations
- Key partnership



WEAKNESSES

- Disadvantages
- Gap in capabilities
- Cash Flow
- Suppliers
- Experience
- Areas to improve
- Causes of lose sales

THREATS

- Economy movement
- Obstacles faced
- Competitor actions
- Political impacts
- Environmental effects
- Loss of key staff
- Market demand

Exercise - SWOT Analysis

Instructions

<p>Strengths</p> <p>Characteristics of a business which give it advantages over its competitors</p>	<p>Weaknesses</p> <p>Characteristics of a business which make it disadvantageous relative to competitors</p>
<p>Opportunities</p> <p>Elements in a company's external environment that allow it to formulate and implement strategies to increase profitability</p>	<p>Threats</p> <p>Elements in the external environment that could endanger the integrity and profitability of the business</p>

Take 5 minutes to write down one to two components for each of the categories - strengths, weaknesses, opportunities and threats.

Would anyone like to share highlights from their SWOT with the group?

Did anything new emerge as you conducted the analysis?

Good-to-Great: The Hedgehog Concept



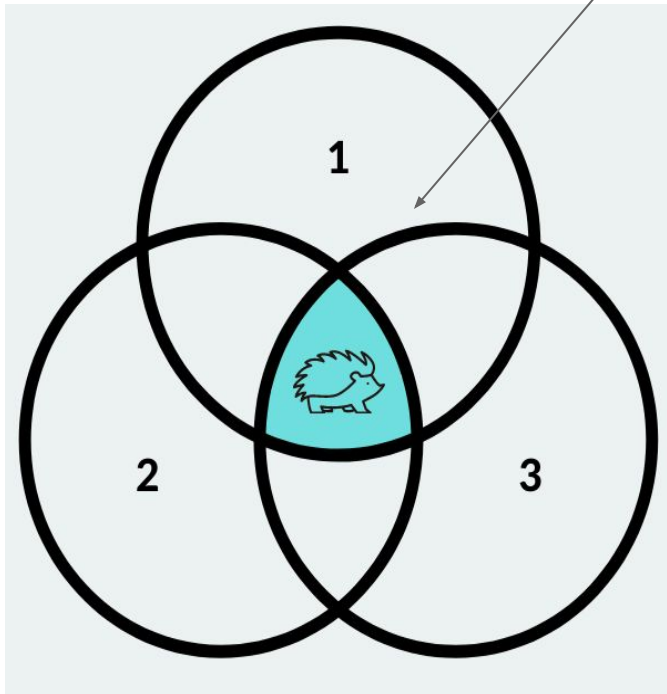
“The fox knows many things, but the hedgehog knows one big thing.”

-Ancient Greek Parable

The Hedgehog Concept

Overview

Your organization's "hedgehog concept" sits at the intersection of these three circles.



1. What are you deeply passionate about? (that you love to do, and that absolutely reflects your values)
2. What can you be the best in the world at? (and, equally important, what you cannot be the best in the world at)
3. What best drives your resource engine? (In other words, what, if you do well, will both fulfill your mission AND generate a sustainable flow of resources that you can invest to increase your impact even further?)



Flywheel Concept

A flywheel is an incredibly heavy wheel that takes huge effort to push.

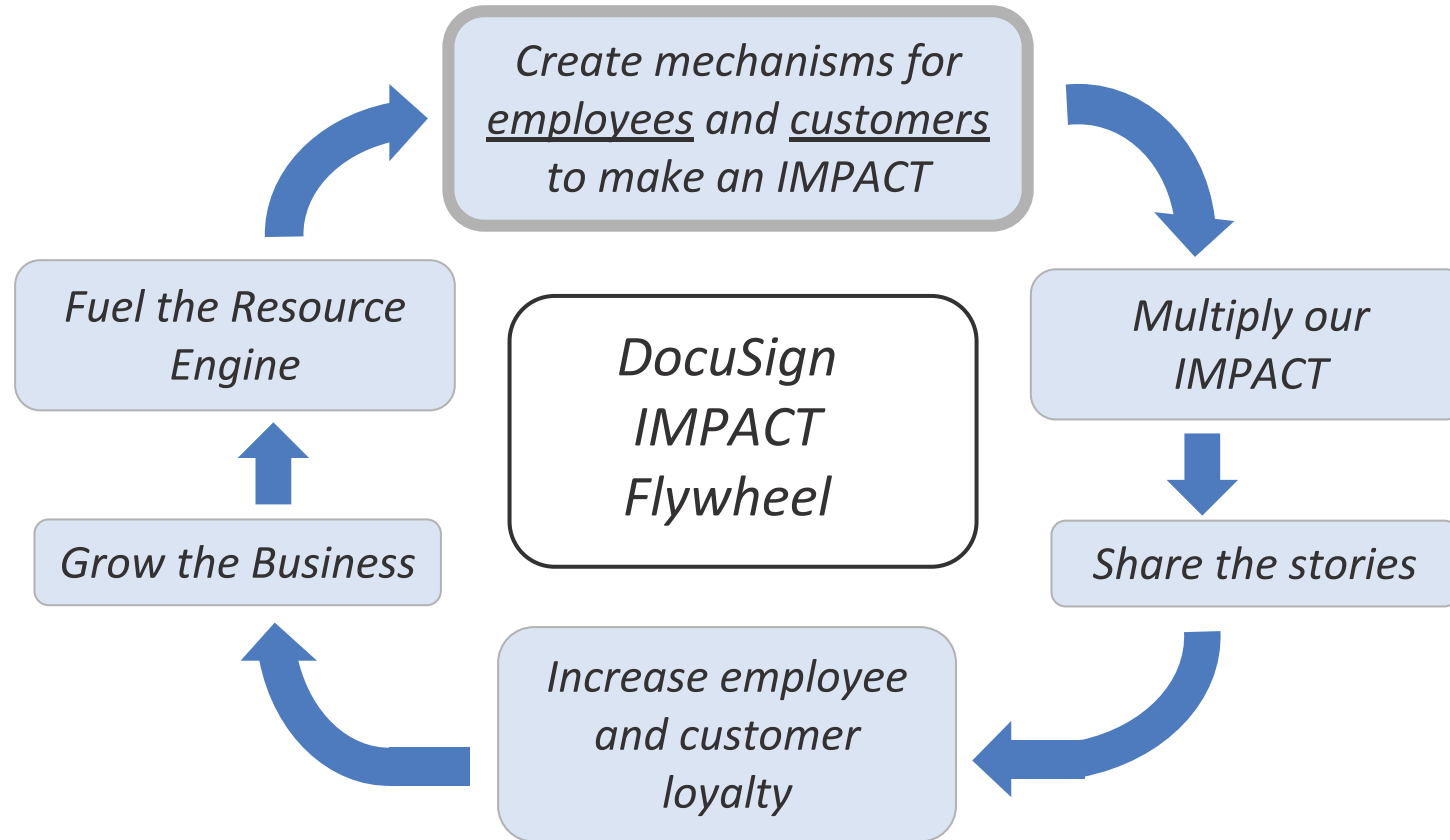
Keep pushing and the flywheel builds momentum, eventually turning itself and building additional momentum.

A flywheel is also a self-reinforcing loop made up of a few key initiatives.

Those initiatives feed and are in turn driven by each other, and build a long-term business.

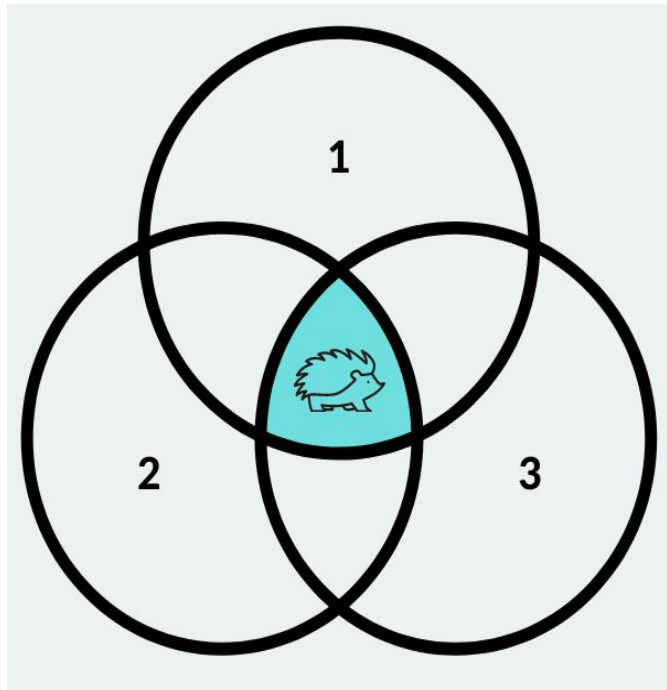


DocuSign IMPACT Flywheel Example



Group Exercise via Padlet

Instructions



Go to the following URL:

<https://padlet.com/t4tadmin/oqj3nt69pu0zoze4>

Answer the following questions as indicated:

- What are you deeply passionate about?
- What can you be the best in the world at?
- What drives your sustainable resource engine?

Exercise Read-out

Share /Review (5 mins)

What were the key takeaways for you from these exercises?

Were there any insights?

Is there anything in your organization that you might approach differently?

Good-to-Great: The Hedgehog Concept



“All good-to-great leaders, it turns out, are hedgehogs. They know how to simplify a complex world into a single, organizing idea—the kind of basic principle that unifies, organizes, and guides all decisions.”

— Jim Collins



Module 2: Refining Your Strategy

- Strategy on a Page (SOAP)*

- SMART Goal Setting*

- 2x2 Prioritization Matrix*

Strategy on a Page (SOAP)

Provides a simple, concise view of the strategy for stakeholders

Used to assess opportunities to determine if fit within strategy

Ensures focus on priorities and alignment with strategy

Concisely articulates on a single page the vision, goals and objectives

Our Vision:

Our business as a force for good in the world.




Our Mission / Purpose:

To bring the strength of DocuSign's people, products and philanthropy to bear in creating stronger communities and a more sustainable planet.

Our Values:

Profit & purpose go hand in hand.

The environment is a stakeholder in our business.

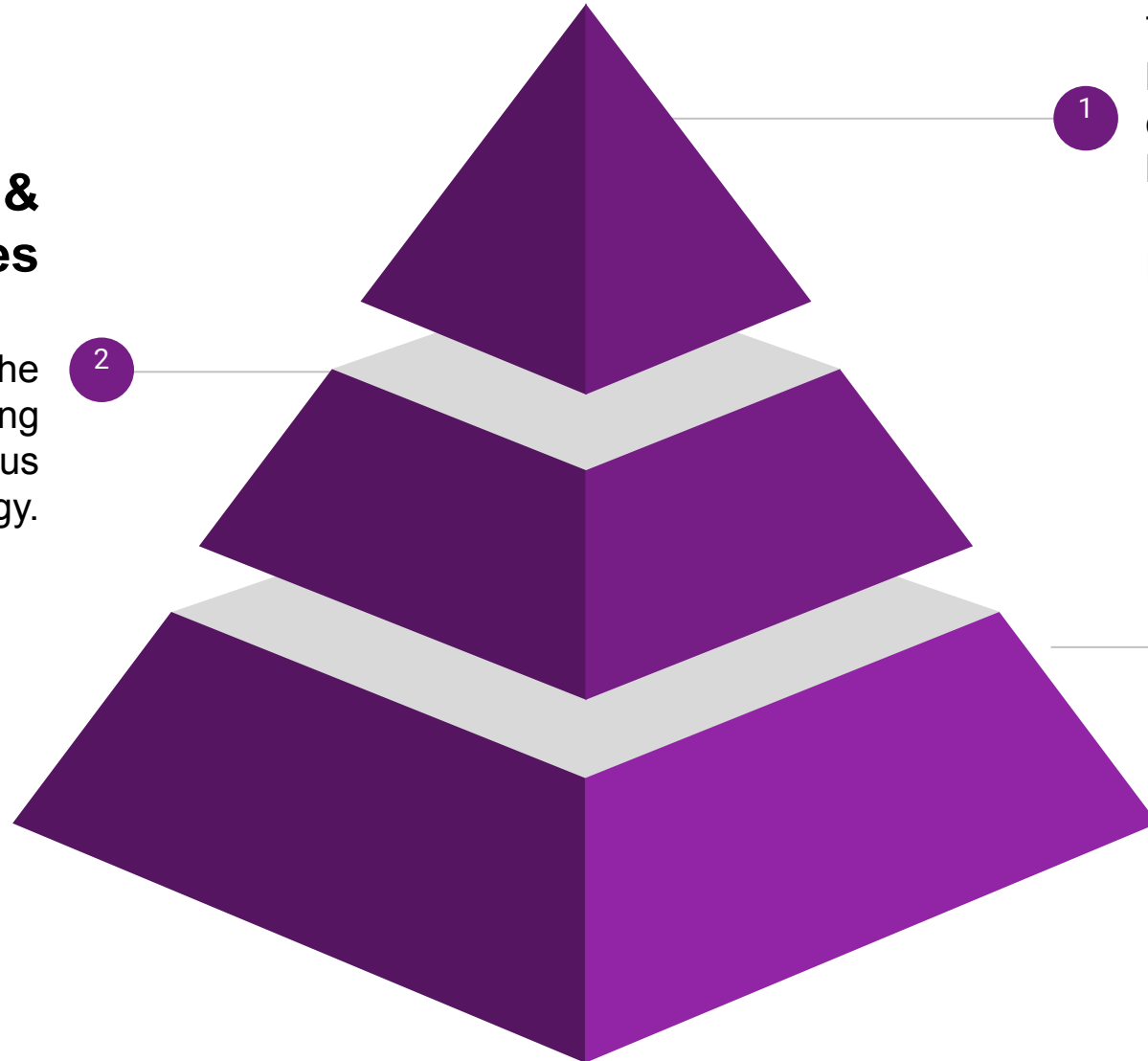
Strategic Pillars	Strategic Focus Areas	Objectives / Goals (Annual)
 Employee Impact	<ol style="list-style-type: none">1. Matching Gifts2. Volunteering3. IMPACT Challenge Grants	<p>Increase matching gifts and volunteer participation through quarterly giving campaigns and service days</p> <p>Increase offering of pro bono opportunities</p> <p>Success Measures: % Participation, Volunteer Hours / Employee</p>
 Customer Impact	<ol style="list-style-type: none">1. Discount/Donate Our Products to Nonprofits2. Storytelling & Events	<p>Grow Product Donation Program for Small Nonprofit Org's</p> <p>Develop Monthly IMPACT Blog Series</p> <p>Success Measures: % increase in donated licenses; # of blog posts</p>
 DocuSign for Forests	<ol style="list-style-type: none">1. Paper Impact Calculator2. Signature Grants3. Operational Sustainability	<p>Update environmental stats & calculator assumptions</p> <p>Implement reduction strategies for business travel, real estate and data centers</p> <p>Success Measures: Emission reduction %; Trees planted & preserved</p>

SOAP Review

What's involved

Deliverables & Enabling Processes

Each team or unit will define the key priorities and enabling processes their team will focus on to deliver on the strategy.



Strategy

The SOAP sits at the organisational level and sets the goals and objectives for all activity at a high level.

Review / Refresh annually.

Execution Plans

Each team or unit will determine what activities they will do and ensure they ladder up to the SOAP (e.g., 90-day action plans, specific budgets, calendar of activities, etc.)

Update quarterly.

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Our Mission / Purpose:

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Strategic Pillars

Strategic Focus Areas

Objectives / Goals (Annual)



Employee Impact

1. Matching Gifts
2. Volunteering
3. IMPACT Challenge Grants

Increase matching gifts and volunteer participation through quarterly giving campaigns and service days

Increase offering of pro bono opportunities

Success Measures: % Participation, Volunteer Hours / Employee



Customer Impact

1. Discount/Donate Our Products to Nonprofits
2. Storytelling & Events

Grow Product Donation Program for Small Nonprofit Org's

Develop Monthly IMPACT Blog Series

Success Measures: % increase in donated licenses; # of blog posts



DocuSign for Forests

1. Paper Impact Calculator
2. Signature Grants
3. Operational Sustainability

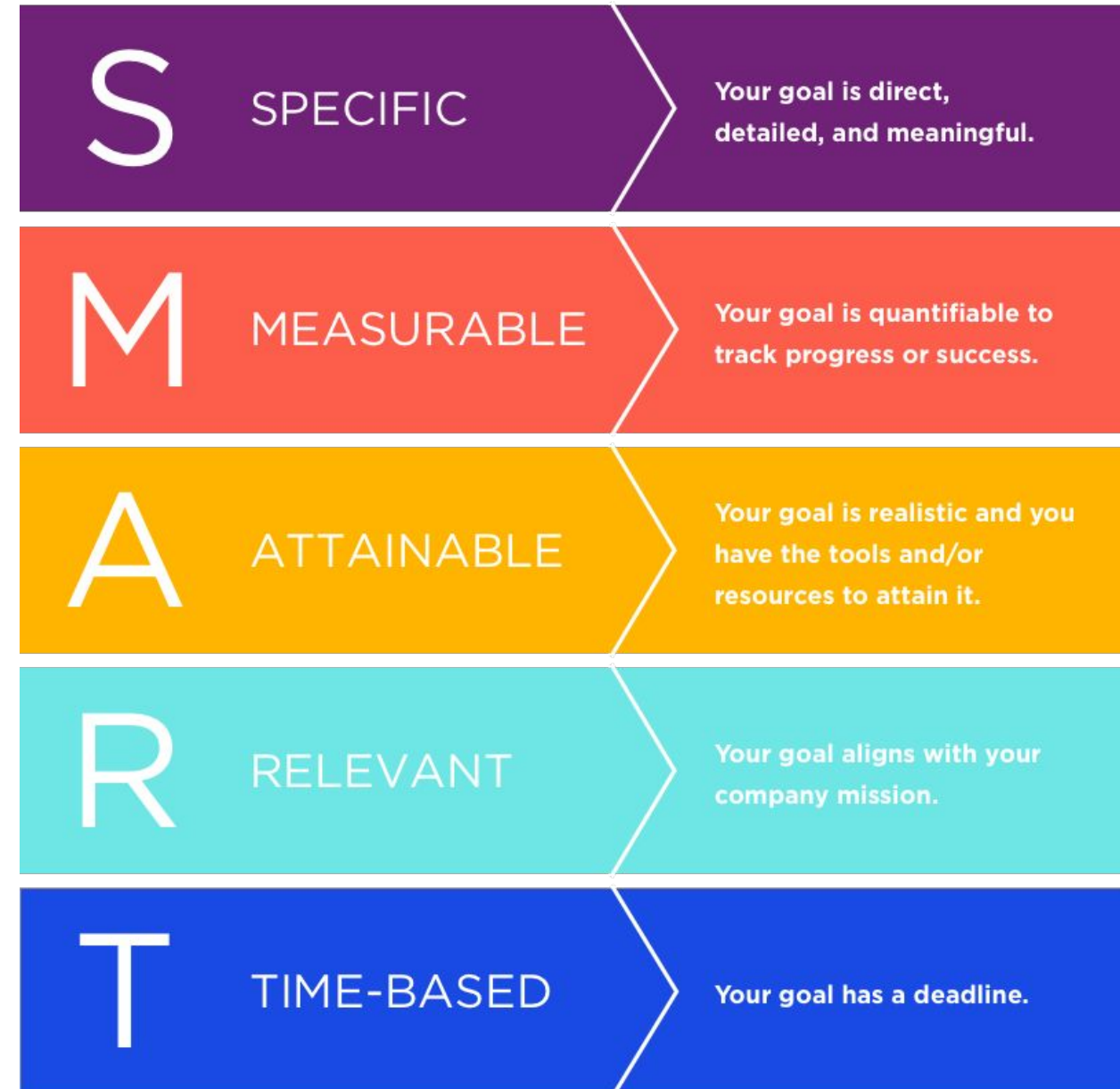
Update environmental stats & calculator assumptions

Implement reduction strategies for business travel, real estate and data centers

Success Measures: Emission reduction %; Trees planted & preserved

SMART Goal Framework

- **Specific:**
Simple, Sensible, Significant
- **Measurable:**
Meaningful, Motivating
- **Achievable:**
Agreed, Attainable
- **Relevant:**
Reasonable, Realistic, Results-based
- **Time-Based:**
Time limited, Cost limited, Time sensitive



SMART Goal Setting

How to Use

SPECIFIC		MEASUREABLE	
What do I want to accomplish?		How much?	
Why is this goal important?		How many?	
Who is involved?		How will I know it's accomplished?	
Where is it located?			
ACHIEVABLE		RELEVANT	
How can I accomplish this goal?		Does this seem worthwhile?	
How realistic is the goal based on other constraints?		Is this the right time?	
TIME-BOUND			
When? What can I do 6 months from now?		What can I do 6 weeks from now?	

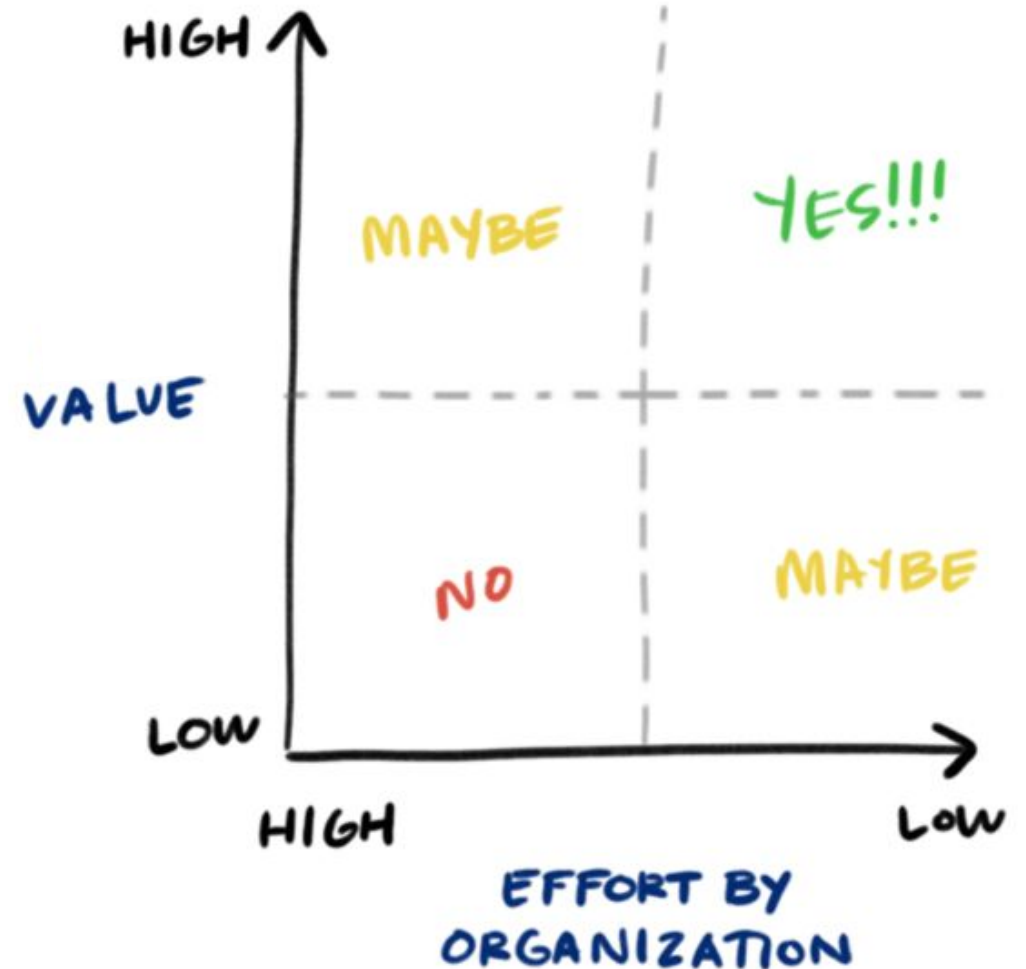
2 x 2 Prioritization Matrix

Once you have goals defined, come up with the activities to meet those goals and prioritize.

Purpose: Used in prioritizing activities (such as during brainstorming) to identify the highest impact activity relative to the effort.

Share examples of activities in your organization from the “yes” (low effort/high impact) and “no” (high effort/low impact) quadrants in the padlet.

<https://padlet.com/t4tadmin/oqj3nt69pu0zoze4>



Breakout #2



Breakout #2 (15 mins + 5 minute Read-out)

Instructions

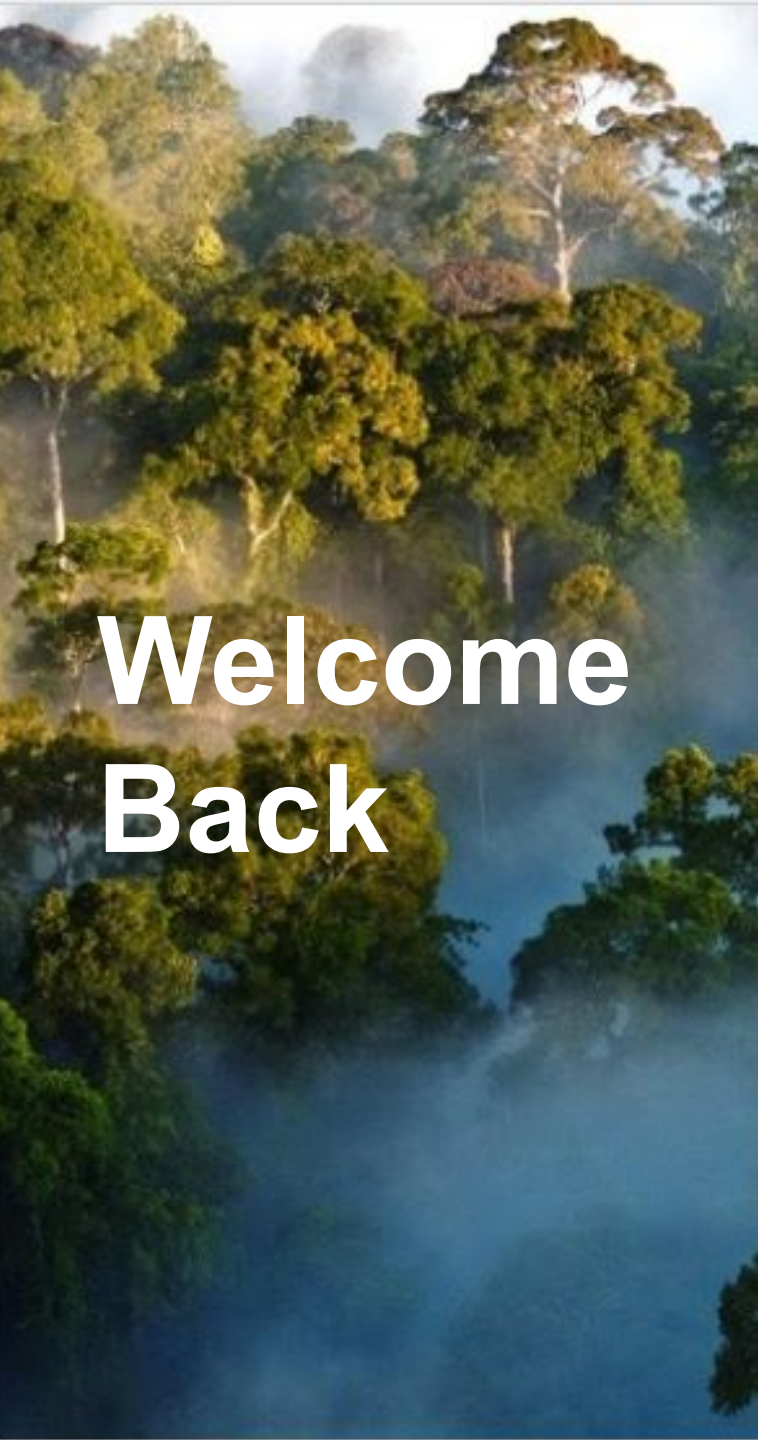
SMART Goals Exercise

- Take a moment to think of 1-2 goals for your organization in 2021.
- In the breakout group, as a group, chose 1-2 organization goals.
- As a group, apply the SMART goal framework to the chosen goals.

One volunteer from each breakout room will share one 2021 organization goal before and after applying the SMART goal framework in the main session.

A low-angle photograph looking up at a large, textured tree trunk in a dense forest. The trunk is the central focus, showing its rough bark and several smaller branches. The background is filled with green foliage and sunlight filtering through the leaves. A blue rectangular text box is positioned in the upper right corner of the image.

Break Time!!
Be back in 30 mins.



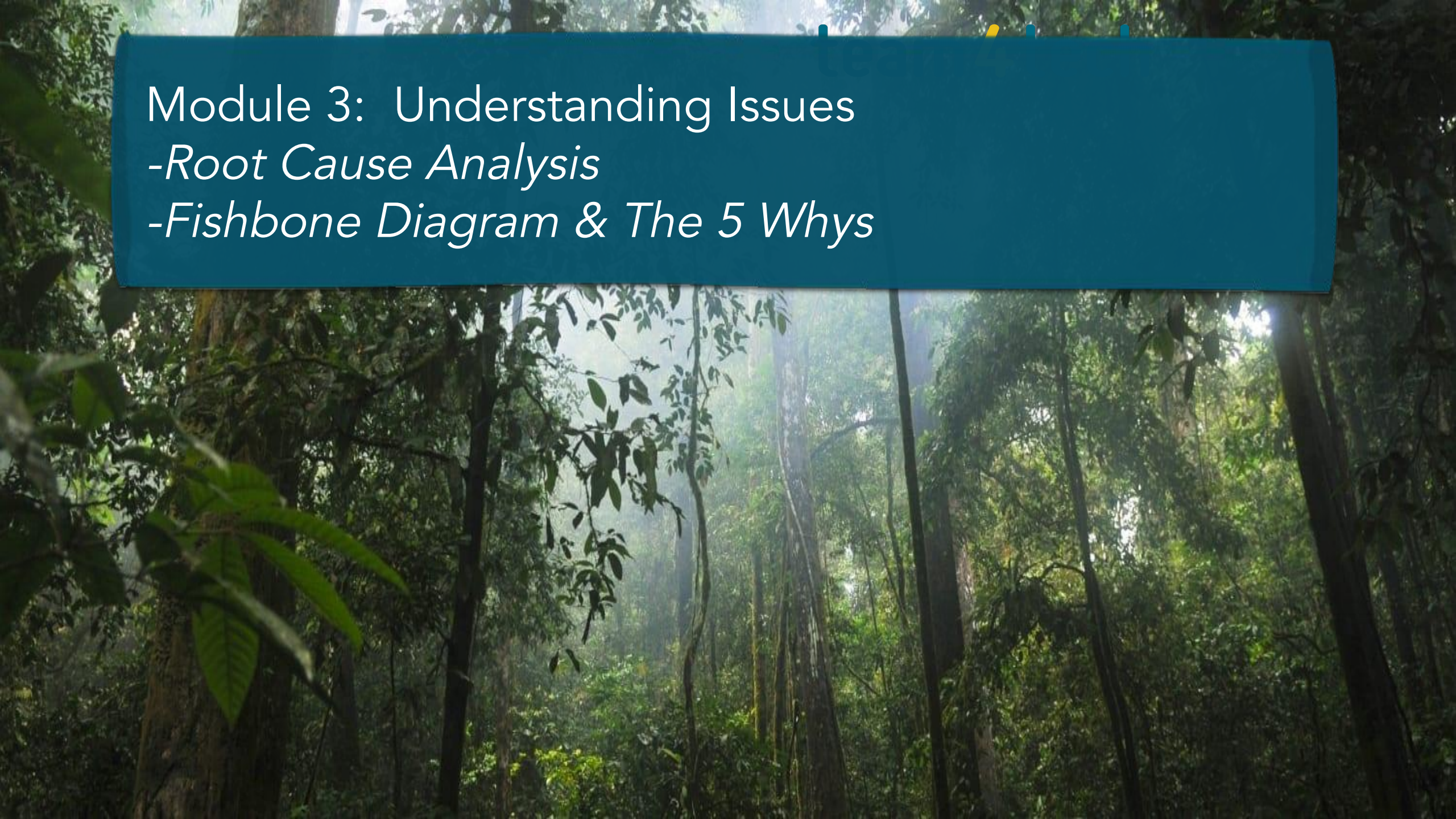
**Welcome
Back**

In another tab in your browser (or on another device), type the following URL: **sli.do**

Enter event code: **39114**

Type an answer to the following question:

What did you do on your break?

A lush tropical forest scene with tall, slender trees and dense green foliage. Sunlight filters through the canopy, creating a dappled light effect. The background is slightly hazy, suggesting a deep forest.

Module 3: Understanding Issues

- Root Cause Analysis*
- Fishbone Diagram & The 5 Whys*

Root Cause Analysis

What are the 3 components?

Within an organization, problem solving, incident investigation, and root cause analysis are all fundamentally connected by 3 basic questions:

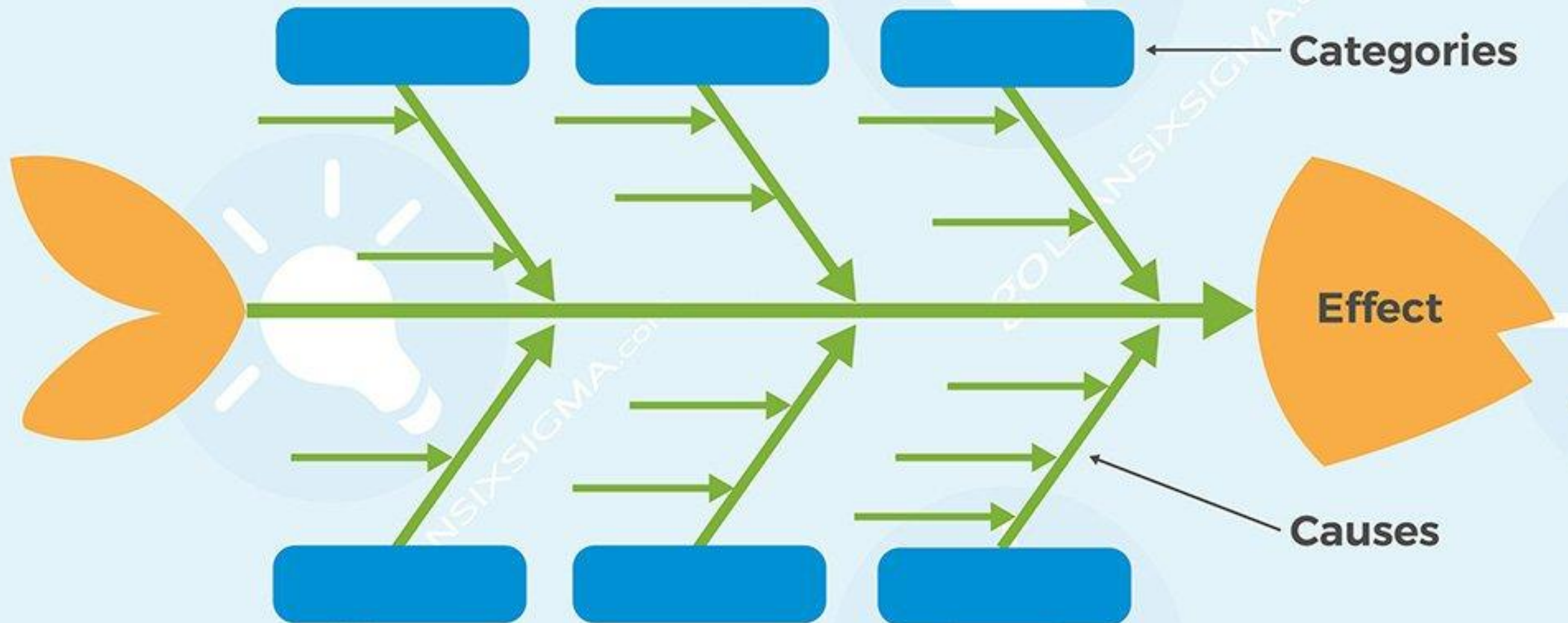
1. What's the problem?
2. Why did it happen?
3. What will be done to prevent it from happening again?

Brainstorming tools used for root cause analysis include:

- Fishbone diagram
- 5 Whys

Fishbone Diagram

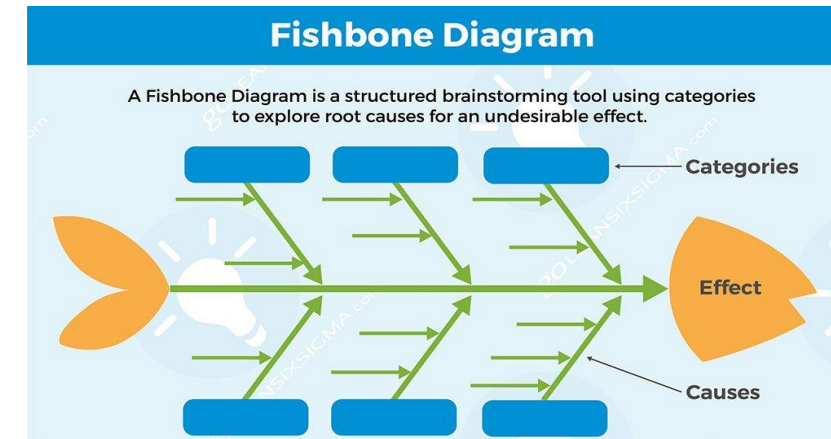
A Fishbone Diagram is a structured brainstorming tool using categories to explore root causes for an undesirable effect.



Fishbone Diagram

How to use it

1. Define a clear problem statement and put that in the fish head
2. Brainstorm possible categories related to the problem and put these in the boxes connected to the backbone of the fish
Examples: people, environment or budget
No specific number of categories are required
3. Brainstorm possible causes and put them in the ribs of the fish connected to the backbone
Examples for people: lack of skill, not enough people
No specific number of causes are required
4. Ask why (use the 5 Whys)



5 Whys

Root Cause Analysis

- Technique used to identify the root cause of a problem
- Usually part of process improvement
- Addresses the root cause of issues, otherwise the error will re-occur and cause more rework.

Problem Statement – There was a traffic accident?

Question: Why was there a traffic accident? ...Because Joe went through a stop sign.

Question: Why did Joe go through the stop sign? ...Because he didn't see it.

Question: Why didn't Joe see the stop sign? ...Because there was a tree branch in the way.

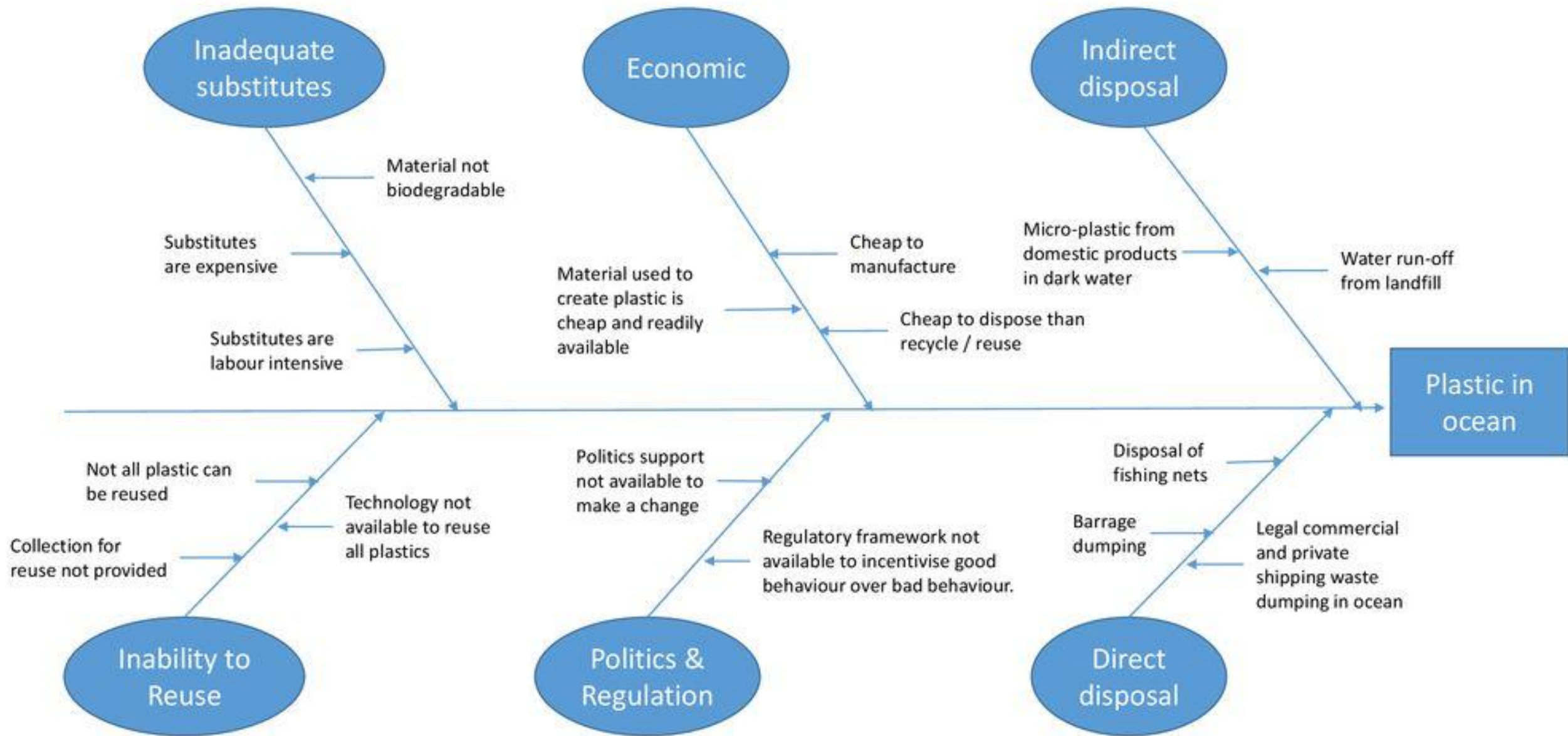
Question: Why was the tree branch in the way? ...Because the city gardeners did not trim it.

Question: Why didn't the city gardener trim the tree? ...Because they are on strike.

5 Whys

How to use it

1. Carefully define the problem statement
 - A poorly defined problem statement will not generate useful root causes
2. Ask “why” the problem happens
3. Continue to ask “why”
4. Write down the answers to the “why” questions
5. Continue until you define the root cause



Fishbone Analysis for Plastic in Ocean

Breakout #3



Breakout #3 (15 mins)

Instructions

Fishbone Diagram

As a group, identify a problem your organization is facing.

Use the Fishbone Diagram brainstorming tool

- Define a clear problem statement
- Brainstorm categories related to the problem
- Brainstorm causes and use the 5 whys to get to root cause
- Pick 1 person from each breakout team to share when we regroup

Exercise Debrief/Wrap-Up

Please share fishbone exercise findings.

- Key Insights? Difficulties?
- Is there anything you might do differently with your organization?
- What other information would be helpful?



Workshop #1 Reflection

Putting it in to practice

Additional Resources

Highlights

Implementation Plan

Additional Resources

Share / Review

Module 1

- [The Hedgehog Concept](#)
- [Social Sector Hedgehog Concept](#)
- [The Flywheel Concept](#)

Module 2

- [Harvard Business Review - Demystifying Strategy: The What, Who, How & Why](#)
- [Great Leaders start with Why](#)

Module 3

- [Goleansixsigma.com – what is a fishbone diagram](#)
- [Gleansixsigma.com – Grand Daddy of Quality Kaoru Ishikawa](#)
- [Mindtools.com](#)

Materials from this and other workshops available here:

<http://www.rainforesttrust.org/capacitybuilding/>

Key Takeaways

Share / Review

<https://padlet.com/t4tadmin/oqj3nt69pu0zoze4>

What topics/tools do you think will be most valuable?

What questions do you have?

As a result of this workshop, I will...

Start	
Stop	
Continue	

90-day Action Plan Template

30 days

60 days

90 days



**Strategic
Planning**

[Empty dotted box for Strategic Planning in 30 days]

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[Empty dotted box for Strategic Planning in 90 days]



**Fundraising
& Comms**

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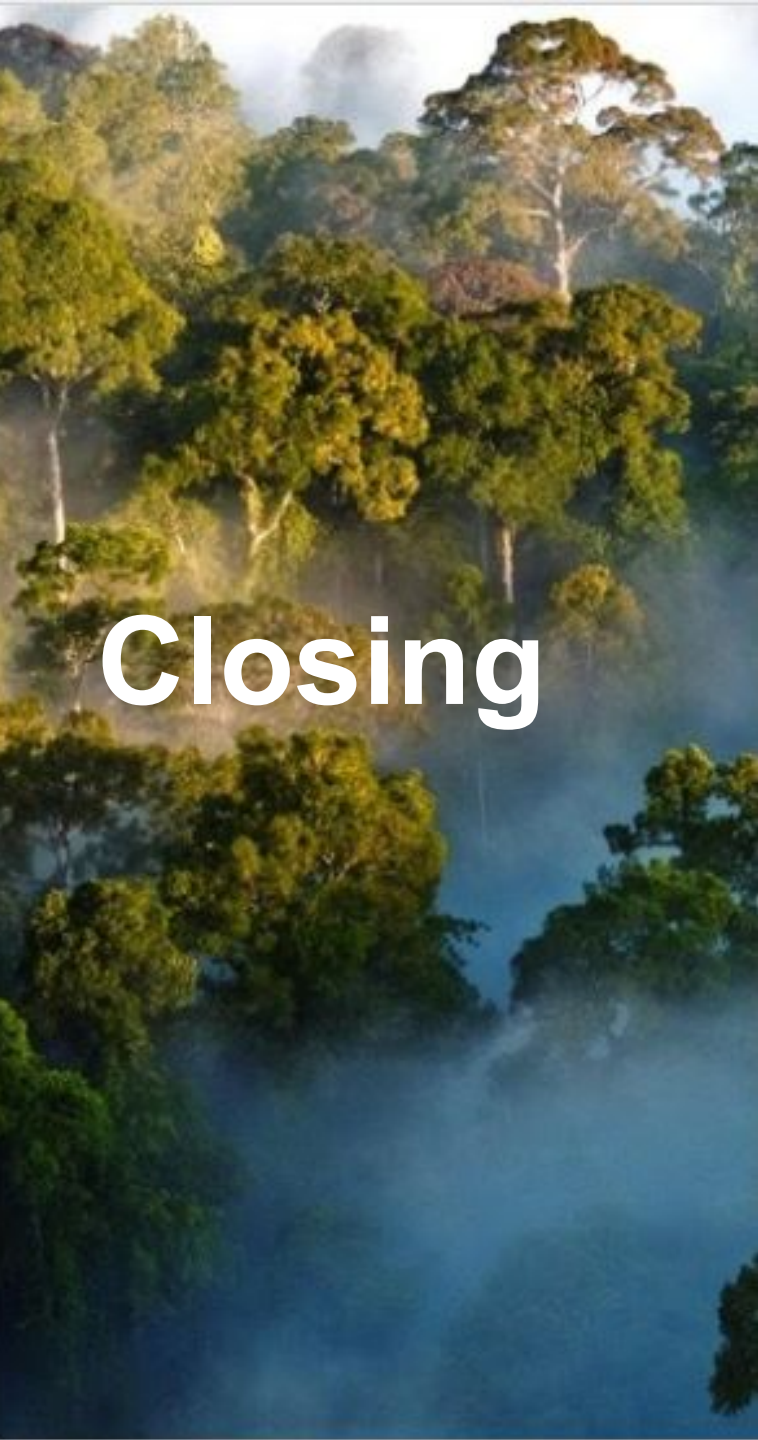


IT

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Type in a single word to answer the following question:

If you had to describe how you are feeling in one word, what would it be?

Closing



Thank you.



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