

# WASHINGTON ASSOCIATION OF COUNTY OFFICIALS

## STRATEGIC PLANNING FOR YOUR ORGANIZATION: BRIDGING THE GAP

FEBRUARY 13<sup>TH</sup> 2024

The collage of screenshots illustrates the following features of the achieveit software:

- Project Status Overview:** A circular chart showing the aggregate status of projects across six categories: Not Started (19), On Track (58), At Risk (32), Achieved (11), Not Achieved (53), and Canceled (6). A second circular chart shows the due date status: Past Due (7), Not Past Due (176).
- Dashboard:** A high-level dashboard titled "Inpatient Clinical Performance" showing aggregate status, due date, progress update, and heat sync count (27). It includes sections for Objective Area Updates (COVID-Funding Deployed, Hospitals with Return to Drafting Plans, Status of Protection Plan), Supply Chain on Time Delivery %, and Impacted Staff.
- Metric Setup:** A screen for setting up a metric, showing a table of goal progress from April to December 2020, and a section for "User Testing".
- Strategic Plan:** A table titled "2020 Strategic Plan" showing the hierarchy and status of various strategic pillars, objectives, and projects.
- Performance Metrics:** A gauge chart titled "Increase Sales Efficiency" showing a current value of 44.81k, with a note that it is "On Track" and "Staying above 0".
- Timeline Updates:** A screenshot showing a progress update for "Annual Operating Plan 2020" dated July 26, 2018, with a status of "On Track" and a value of 44,809.
- My Dashboard:** A summary dashboard for "My Dashboard" showing assigned items, update status, due date, and status filters.

# MEET YOUR SPEAKER



**JOE KRAUSE, MS, MBA** | SVP, Strategy Consulting

A co-founder of AchieveIt, he single-handedly built the Strategy Consulting department and has helped our customers successfully execute thousands of plans over his 10+ year tenure. Joe has a passion for helping teams drive towards successful business outcomes with a focus on practical, easy-to-use advice. Joe graduated from Seton Hall University with a Bachelor of Arts in political science and obtained a Master's of Science in Healthcare Communication from Boston University. Joe most recently completed his studies at Rutgers University where he obtained a Master's in Business Administration with a concentration in Finance.

# LEARNING OBJECTIVES FOR TODAY

- ✓ The importance of strategic planning and performance metrics
- ✓ What are The Five Elements every plan needs?
- ✓ How should approach executing your strategic plan?

# THE IMPORTANCE OF STRATEGIC PLANNING AND PERFORMANCE METRICS

# WHAT IS THE PROBLEM?

- “ Less than 10% of strategies effectively formulated are **effectively executed.** ”
- “ In the majority of cases – **we estimate 70%** – the real problem isn’t bad strategy. It’s **bad execution.** ”



# IF YOU'RE LIKE MOST PEOPLE WE TALK WITH...

## YOU'RE PRETTY FAMILIAR WITH THESE THREE ROLES



### THE ARCHITECT

Sets the vision and creates plans

#### CHALLENGES

- » Communicates the strategy
- » Manages competing priorities

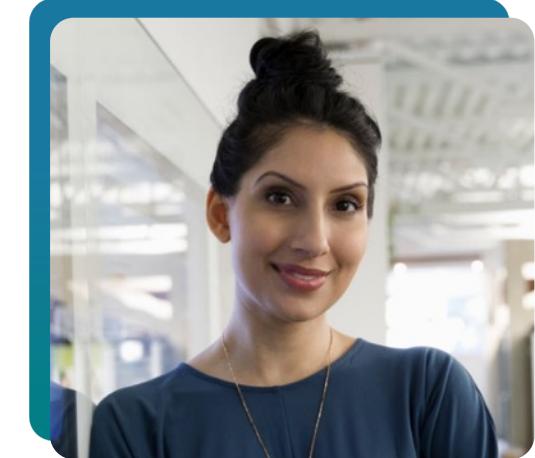


### THE TRANSLATOR

Assigns work and makes sure it's getting done

#### CHALLENGES

- » Herds cats
- » Responsibility with potentially limited authority



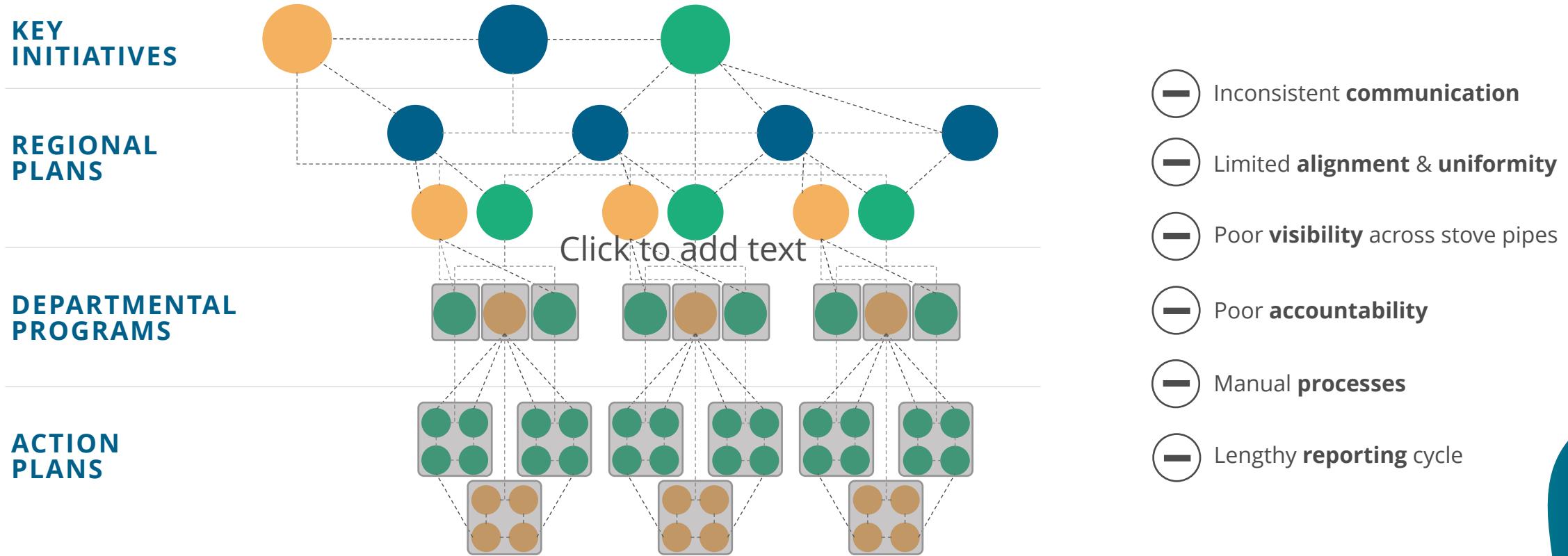
### THE DOER

Actually does the work

#### CHALLENGES

- » Works with limited understanding of "why"
- » Constantly in the weeds

# THE NIGHTMARE OF MANAGING INTEGRATED PLANS



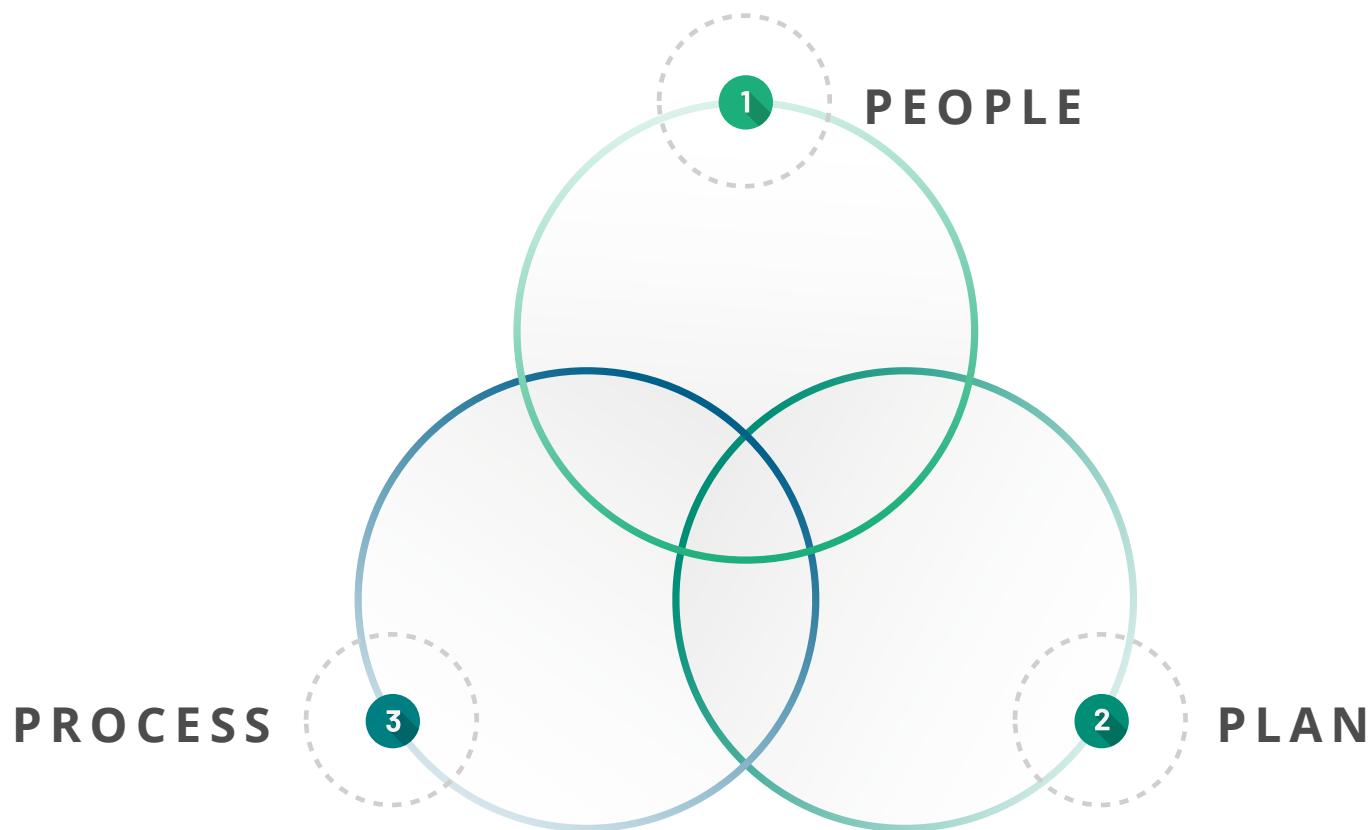
# INTEGRATED PLAN MANAGEMENT

STRATEGIC  
PLANNING

PROJECT  
MANAGEMENT



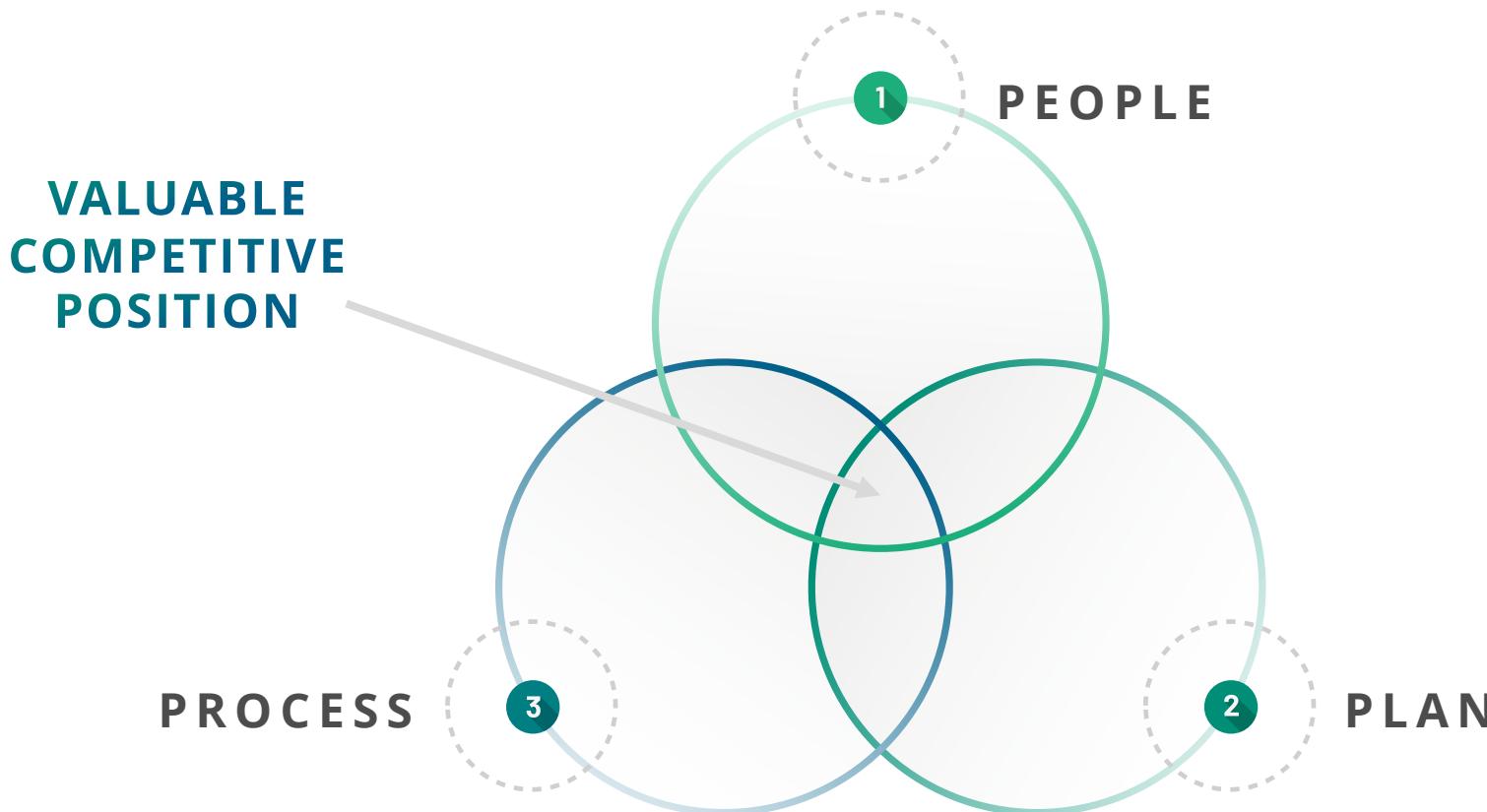
# THE PROBLEM



**SUCCESSFUL EXECUTION TAKES ALL 3**

# STRATEGY EXECUTION

## WHY IS EXECUTION IMPORTANT?



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# THE 5 ELEMENTS EVERY PLAN SHOULD HAVE

# THE 5 ELEMENTS EVERY PLAN NEEDS



1

Quantitative  
Outcomes

2

Ownership

3

Due Dates

4

Cadence of  
Accountability

5

Alignment

# THE 5 ELEMENTS EVERY PLAN NEEDS



1

Quantitative  
Outcomes

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Cadence of  
Accountability

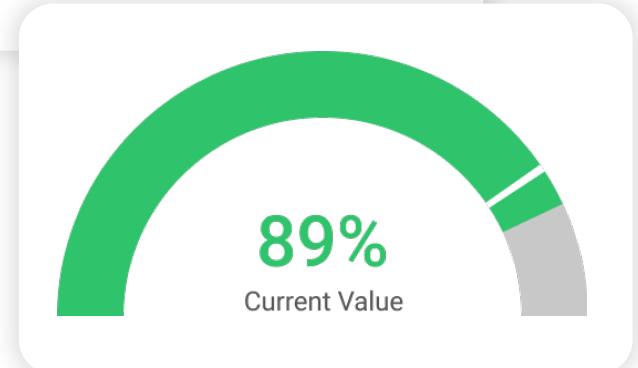
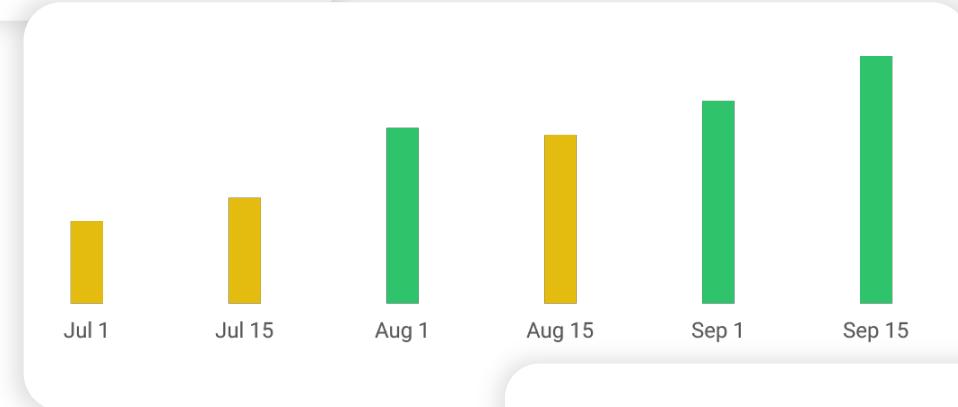
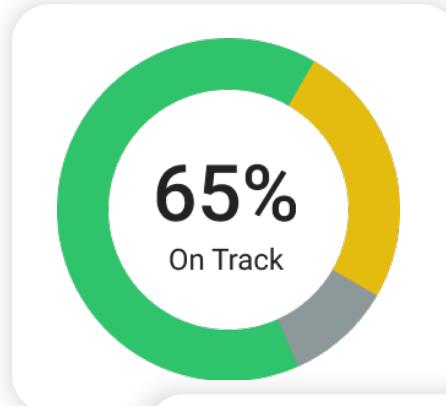
5

Alignment

# 1

## QUANTITATIVE OUTCOMES

- ✓ What gets measured, gets managed
- ✓ Pick the critical few
- ✓ Is one target per measure enough?
- ✓ Make your plan retrospectives more factual and less emotional



# THE 5 ELEMENTS EVERY PLAN NEEDS



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Outcomes

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Accountability

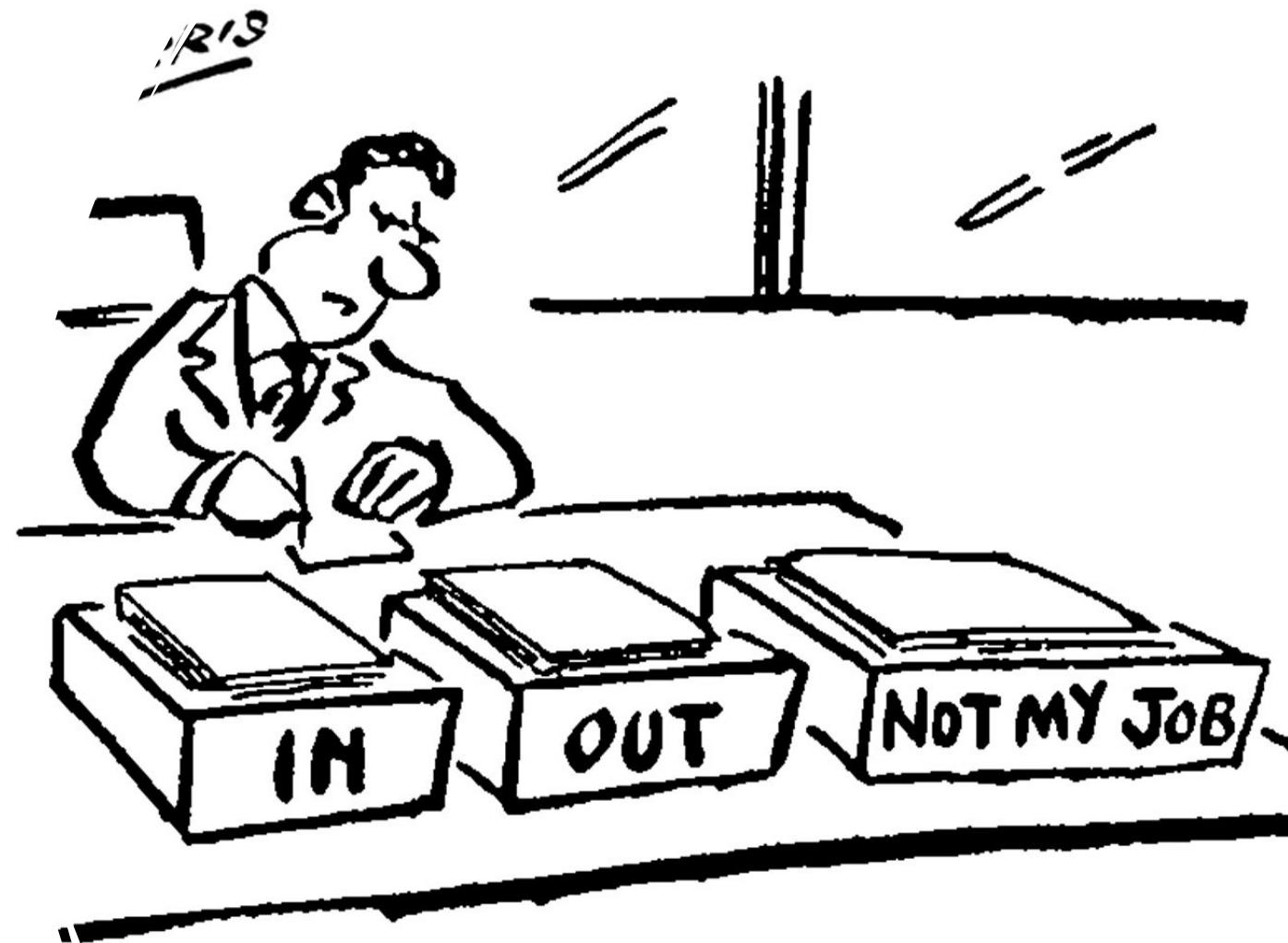
5

Alignment



## OWNERSHIP

- » No owners
- » Too many owners



# accountability noun

## **Definition of *accountability***

: the quality or state of being accountable

*especially* : an obligation or willingness to accept responsibility or to account for one's actions

# THE 5 ELEMENTS EVERY PLAN NEEDS



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Alignment

# 3

## DUE DATES

- » Completion deadline
- » Deliverable clusters
- » Start dates



# THE 5 ELEMENTS EVERY PLAN NEEDS



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Accountability

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Alignment

4

# CADENCE OF ACCOUNTABILITY

- » Beware the whirlwind of daily operations
- » What separates good organizations from great organizations?
- » *"In real life, strategy is actually very straightforward. You pick a general direction and implement it like a hell."*

- Jack Welch

Assigned To

Select user(s)

Progress Update Frequency

Select

Start Date

 From

Due Date

To

# THE 5 ELEMENTS EVERY PLAN NEEDS



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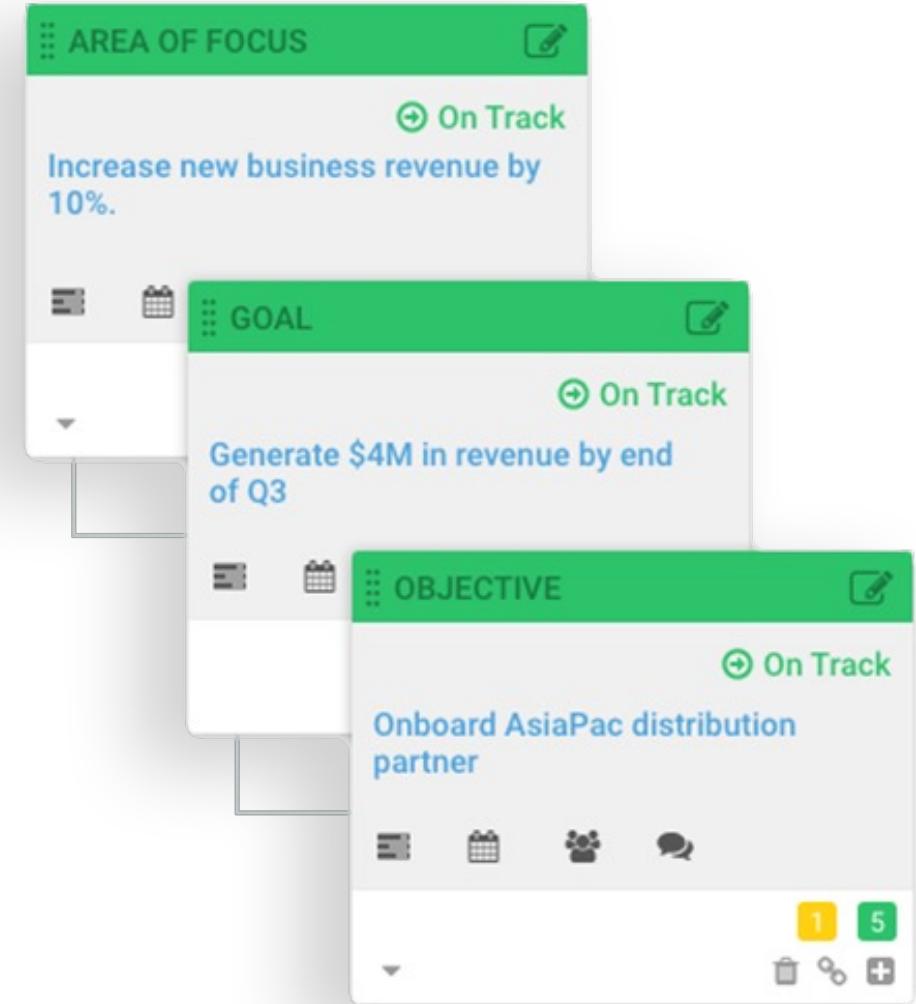
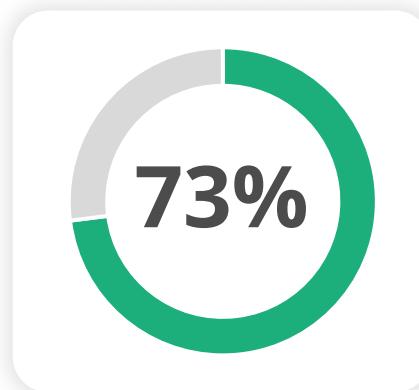
5

Alignment

# 5

# ALIGNMENT

There is a 73% chance work will be **completed** when contributors understand alignment.



# FIND YOUR JOURNEY OF CULTURAL EVOLUTION

## EXPLORING THE 4 STAGES



# STAGE ONE

## CULTURE OF COLLABORATION



For most, a culture of collaboration  
**HAPPENS NATURALLY**

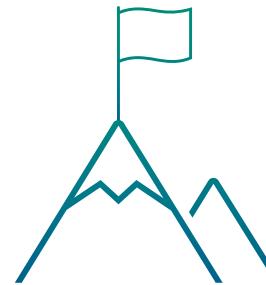


**LITTLE IS DONE TO  
TRACK PERFORMANCE,**  
being busy is often mistaken for  
being strategic, and a lot gets  
done with little accomplished.

## STAGE TWO

### CULTURE OF ACCOUNTABILITY

Conquering this mountain  
**REQUIRES THREE CHANGES**  
within the organization



It is important to:



**TRACK**  
measurable outcomes



**PROVIDE**  
access to all information



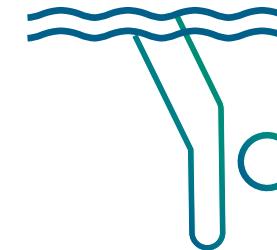
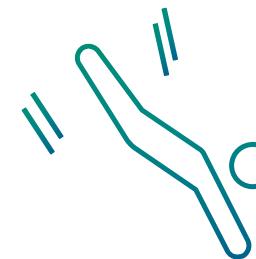
**ASSIGN**  
firm due dates

## STAGE THREE

### CULTURE OF EXECUTION



DIVING INTO THIS STAGE  
involves two factors



Addressing the organization's most  
**CRITICAL NEEDS** and **CASCADING**  
**STRATEGY** to everyone in the organization

## STAGE FOUR

### CULTURE OF INNOVATION



Once you achieve a culture of execution,  
**THE REST IS EFFORTLESS**

Everyone knows their performance  
affects **THE COMPANY VISION**



Team members make better decisions,  
and **QUESTION THE STATUS QUO**

When team members question the status  
quo, they **DARE TO INNOVATE**



# THE 5 ELEMENTS EVERY PLAN NEEDS



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Alignment

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# HOW TO BUILD YOUR PLAN AND PERFORMANCE METRICS

# THREE STEPS TO PREPARE FOR YOUR PLANNING RETREAT

1

How to **prepare** for  
your planning retreat

2

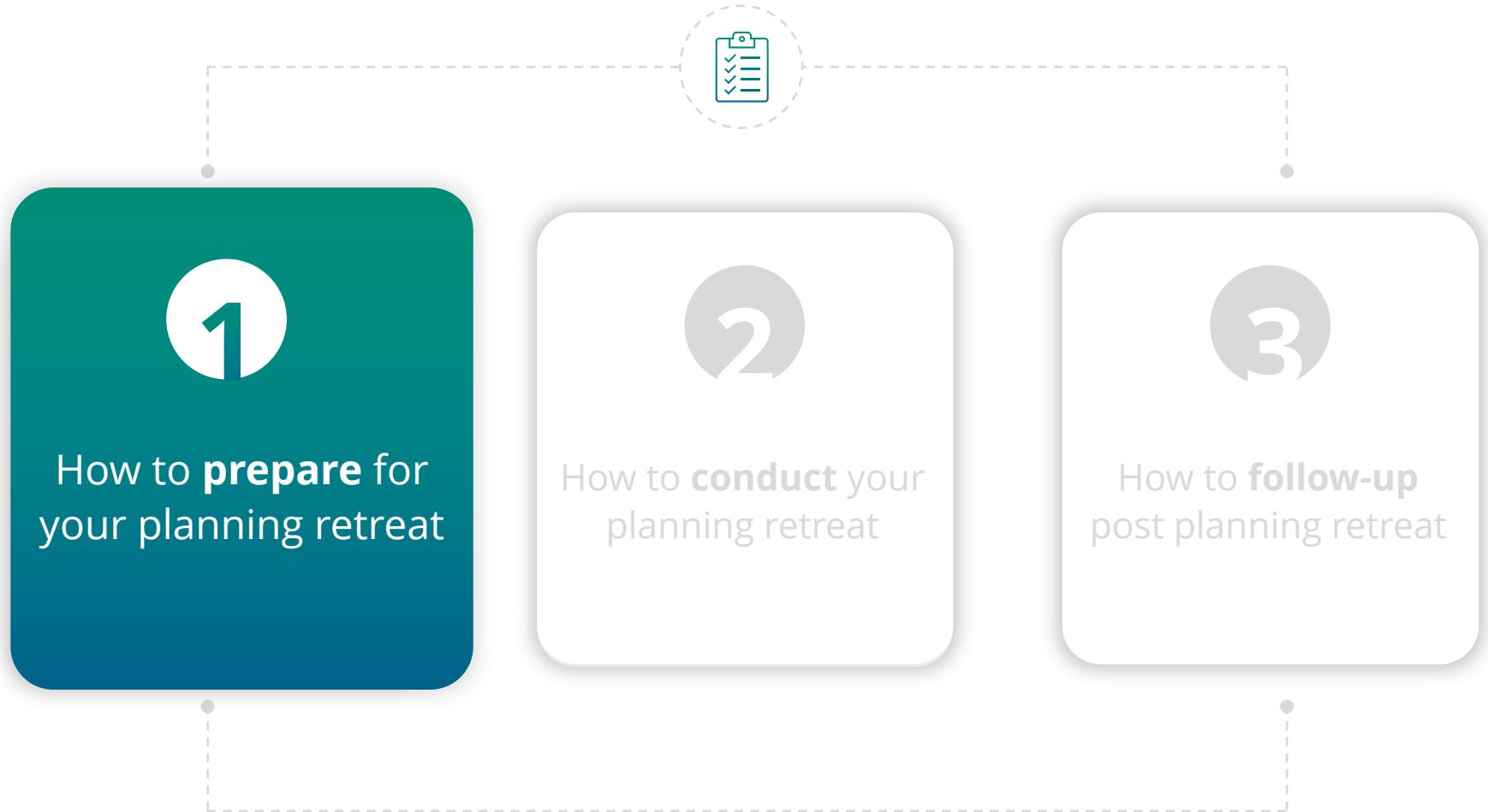
How to **conduct** your  
planning retreat

3

How to **follow-up**  
post planning retreat



# PRINCIPLES COVERED TODAY



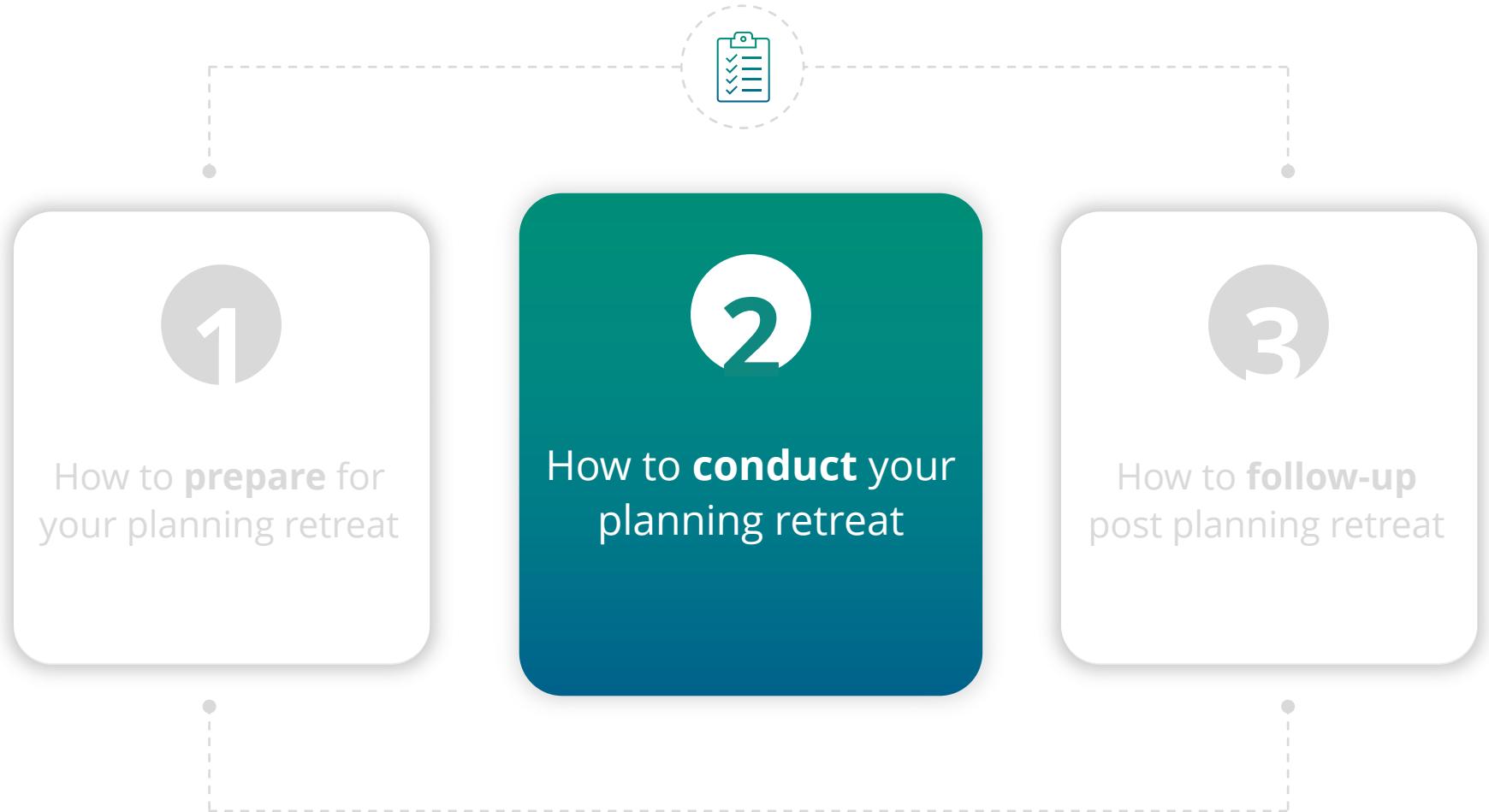
# 01

## PREPARING FOR YOUR RETREAT

- ✓ Choose your stakeholders wisely
- ✓ Create a crystal clear agenda
- ✓ Host the retreat in a different location (could be in the same building)
- ✓ Set clear expectations/outcomes



# PRINCIPLES COVERED TODAY



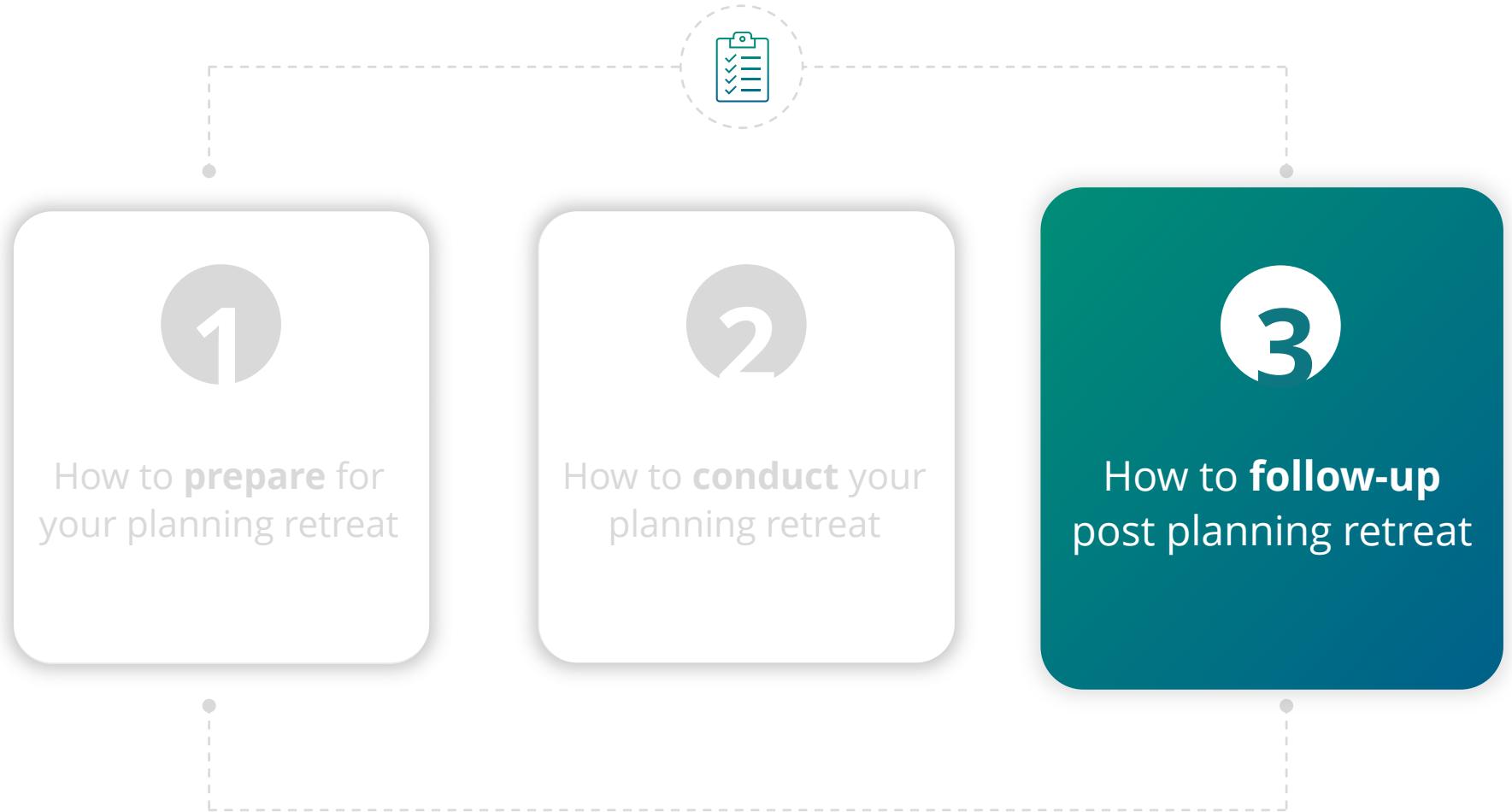
A photograph showing a group of six people in a modern office or meeting room. A woman in a red blazer is standing and speaking to a group of five people seated around a light-colored wooden conference table. The room has large windows, a stone wall, and a glass-enclosed shelving unit in the background. The image is partially obscured by a large, semi-transparent teal-colored wedge shape.

# 02

## CONDUCTING YOUR RETREAT

- ✓ Have a facilitator
- ✓ Try to have concrete goals vs. abstract outcomes
- ✓ Be sure to take breaks!
- ✓ Set clear, time-bound next steps

# PRINCIPLES COVERED TODAY



# 03

## FOLLOWING UP POST RETREAT

01

Follow up within 24 hours using the **5 elements of a good recap**:

**01** Show appreciation

**02** Provide a recap

**03** Summarize key decisions & answer lingering questions

**04** List out next steps and who is accountable

**05** Share the next meeting date

02

**Share the plan** with the broader organization to:

- Yield better results
- Increase buy in
- Create a clear sense of ownership & understanding

03

Have clear guidance on **plan expectations**, including:

• Where	• Who
• How	• What

# PRINCIPLES COVERED TODAY

1

How to **prepare** for  
your planning retreat

2

How to **conduct** your  
planning retreat

3

How to **follow-up**  
post planning retreat



# PLAN LEVELS OVERVIEW

## OBJECTIVES

Our **Objectives** are key areas we have targeted for either improvement or growth as an organizational whole

## GOALS

Our **Goals** are milestones we will set for each quarter of the fiscal year in order to meet our Objective by year's end

## STRATEGIES

Our **Strategies** are key projects or initiatives that individuals and teams will lead in order to support work on our Goals

## PERFORMANCE MEASURES

Our **Measures** are quantitative benchmarks we will use to track our progress. Measures will help us evaluate if our Strategies are effectively supporting our Goals and Objectives

# HOW TO USE ACHIEVEIT STATUSES

STATUS	DEFINITION/HOW TO UTILIZE
 Not Started	Use this status when a plan item has a start date in the future. The system won't ask the assigned-to user for updates until the start date has passed
 On Track	Status given to a project that is running within budget, timeline, and expected results. Plan to discuss these projects at the end of your management meeting, if time allows, after you have addressed red and yellow items that require more attention.
 Off Track	Status given when some aspect of the could potentially derail or deserves special attention. E.g., You may be within budget, but can already foresee an issue with a vendor that might extend your timeline in the weeks ahead and potentially compromise your results. We call these items out to discuss how management can remove potential obstacles, or adjust parameters (budget, timeline, expected results) as needed.
 At Risk	Status given when some aspect of the project has fallen dramatically behind, encountered a major setback, or ran significantly over budget. Plan to discuss these times at the beginning of your meeting and come prepared to offer potential solutions or remedial efforts.
 Achieved	What can we learn from this successful plan item that we can apply to other areas of the business?
 Not Achieved	This status is used for items that did not achieve a defined outcome or metric target.
 Canceled	<ol style="list-style-type: none"><li>1. On Hold: select canceled for a project that will be re-started at a future date. Update the status, new start and due date, if applicable, and add a comment.</li><li>2. Canceled: select canceled for a project that is no longer being worked on and will not be restarted in the future. Update the status and add a comment.</li></ol>

# WHAT MAKES A GOOD COMMENT?

01



## 2-3 sentences explaining why the plan item is either red, yellow, or green

- Describe why your project has been categorized as green/yellow/red.
  - Which elements are going well and driving its successful completion?
  - Which are off track and could use preemptive intervention? Why?
  - Which are dramatically off and in need of immediate intervention?
- Be clear, specific, and concise

02



## 2-3 sentences about what you're going to do next

- Outline your recommendation for next steps on the items with yellow and red statuses.
- By properly outlining next steps, it will simulate a more productive conversation during the meeting.

Annual Strategic Plan  
Created by Admin (See Permissions)

Filters: No filters applied. Add Filters

Level	Name	Status	Start Date	Due Date	Metric Description	Current Value	Last Updated
1	Plan	2019-2021 Strategic Plan	On Track	1/1/2019	12/31/2021		1/1/2019
1.1	Focus Area	Investment	On Track	12/31/2017	12/31/2021		
1.1.1	Goal	Increase New Business Revenue by 10%	On Track	1/24/2018	12/31/2021	Stay between baseline of \$100,000 and target of \$100,000	4/6/2021
1.1.1.1	Objective	Expand into Southern region for new product launch	On Track	1/2/2018	1/1/2022		12/1/2021
1.1.1.1.1	Initiative	Complete market analysis and financial projections	Achieved	1/16/2018	1/16/2018	Stay between baseline of 100% and target of 100%	100%
1.1.1.1.2	Initiative	Execution	On Track	7/5/2018	8/8/2019	Stay between baseline of 100% and target of 100%	100%
1.1.1.1.3	Initiative	Add new sales team and training sessions	Not Achieved	7/5/2018	8/8/2019	Stay between baseline of 100% and target of 100%	100%
1.1.1.2	Objective	Product Beta Sales Revenue	Achieved	1/1/2018	9/29/2019		
1.1.1.2.1	Initiative	Reach out to 100 new customers	On Track	5/9/2018	12/31/2021	Stay between baseline of 100% and target of 100%	92%
1.1.1.2.2	Initiative	Revenue Cycle Management Project	Achieved	1/1/2018	10/15/2018		
1.1.1.3	Goal	Increase Market Share by 2.5%	On Track	1/1/2018	12/31/2021	Stay between baseline of 100% and target of 100%	6.2%
1.1.1.3.1	Objective	Acquire 80% of Regional Prospects	Off Track	4/17/2018	12/31/2021	Stay between baseline of 80% and target of 80%	70%
1.2.1.1	Initiative	Deploy Account-Based Marketing Campaigns	Achieved	1/1/2018	3/4/2019		

# WHAT MAKES A STRONG PLAN?

## 5 KEY ELEMENTS FOR SUCCESS



ALIGNMENT



ASSIGNED TO USER



START & DUE DATES



QUANTIFIABLE OUTCOMES

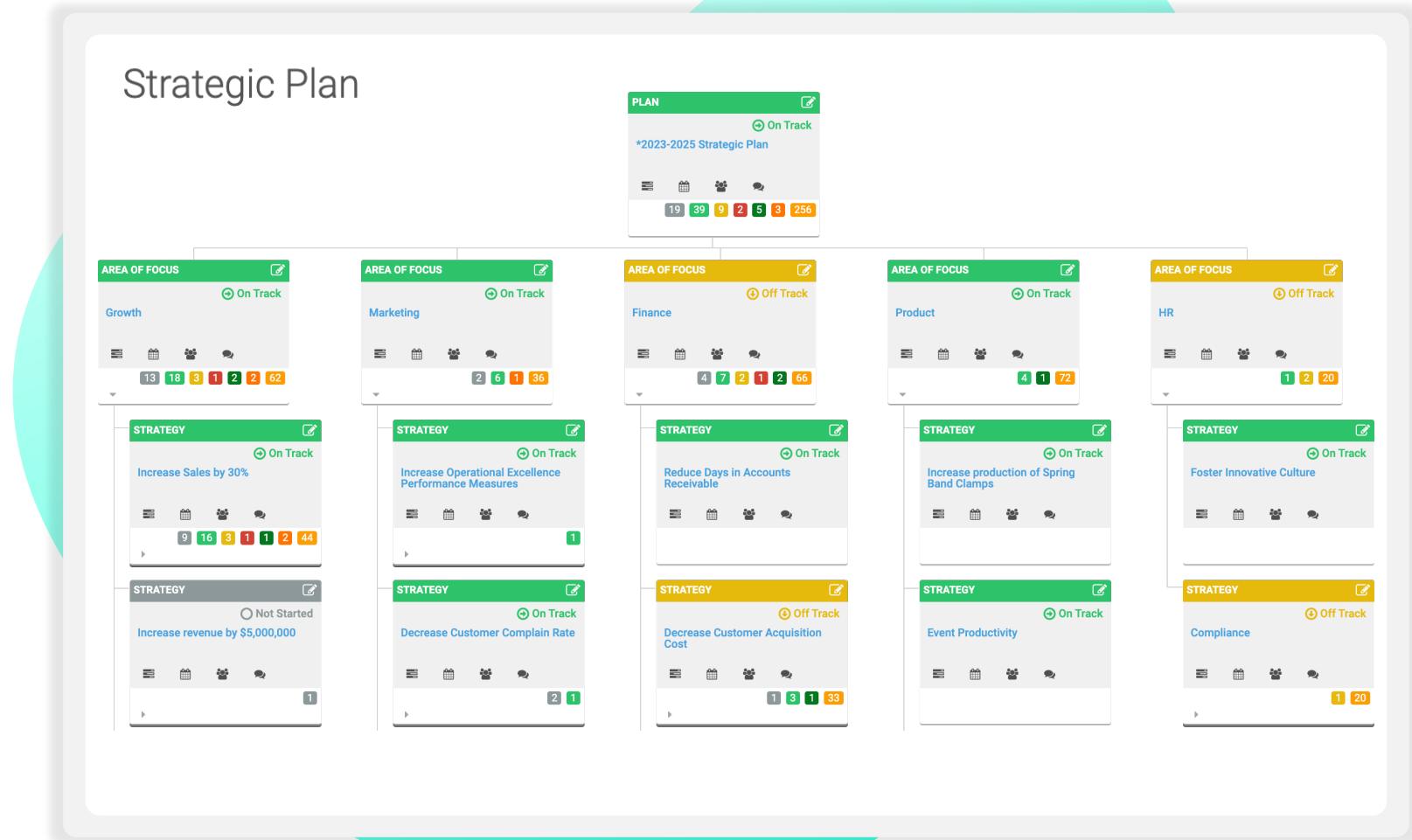


FREQUENCY

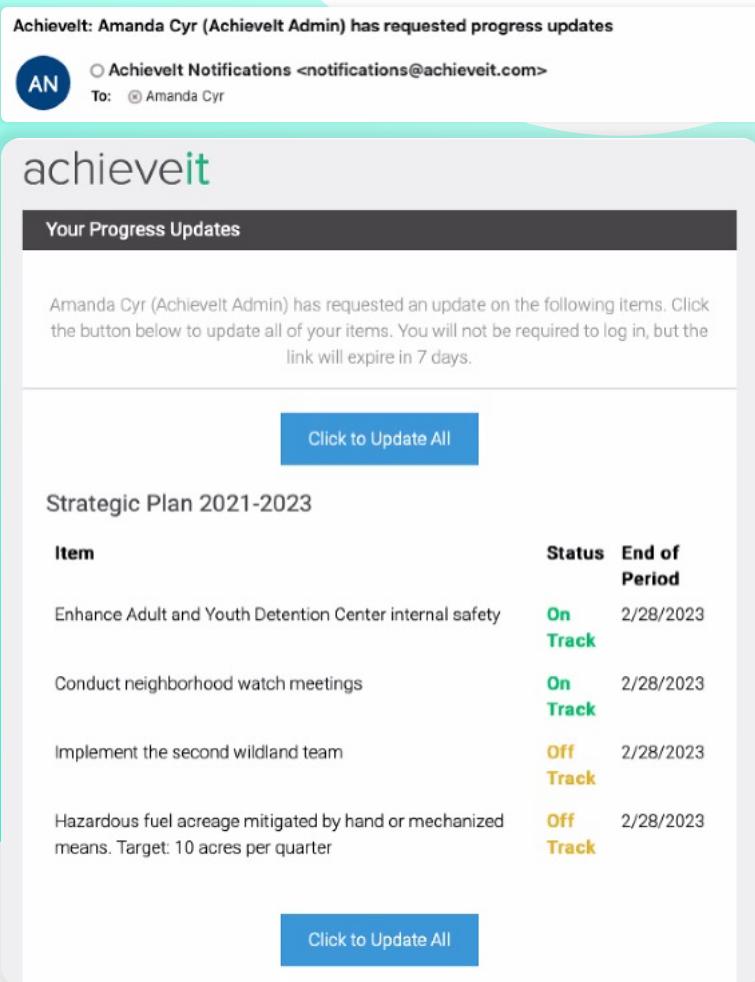
# Connect KPIs, objectives, and goals

Tree view shows the relationships and alignment of KPIs, Objectives, Goals, etc.

This gives the ability for these measures to cascade through the organization.



# Automated update requests



Achieveit: Amanda Cyr (Achieveit Admin) has requested progress updates

AN ○ Achieveit Notifications <notifications@achieveit.com>  
To: Amanda Cyr

achieveit

Your Progress Updates

Amanda Cyr (Achieveit Admin) has requested an update on the following items. Click the button below to update all of your items. You will not be required to log in, but the link will expire in 7 days.

Click to Update All

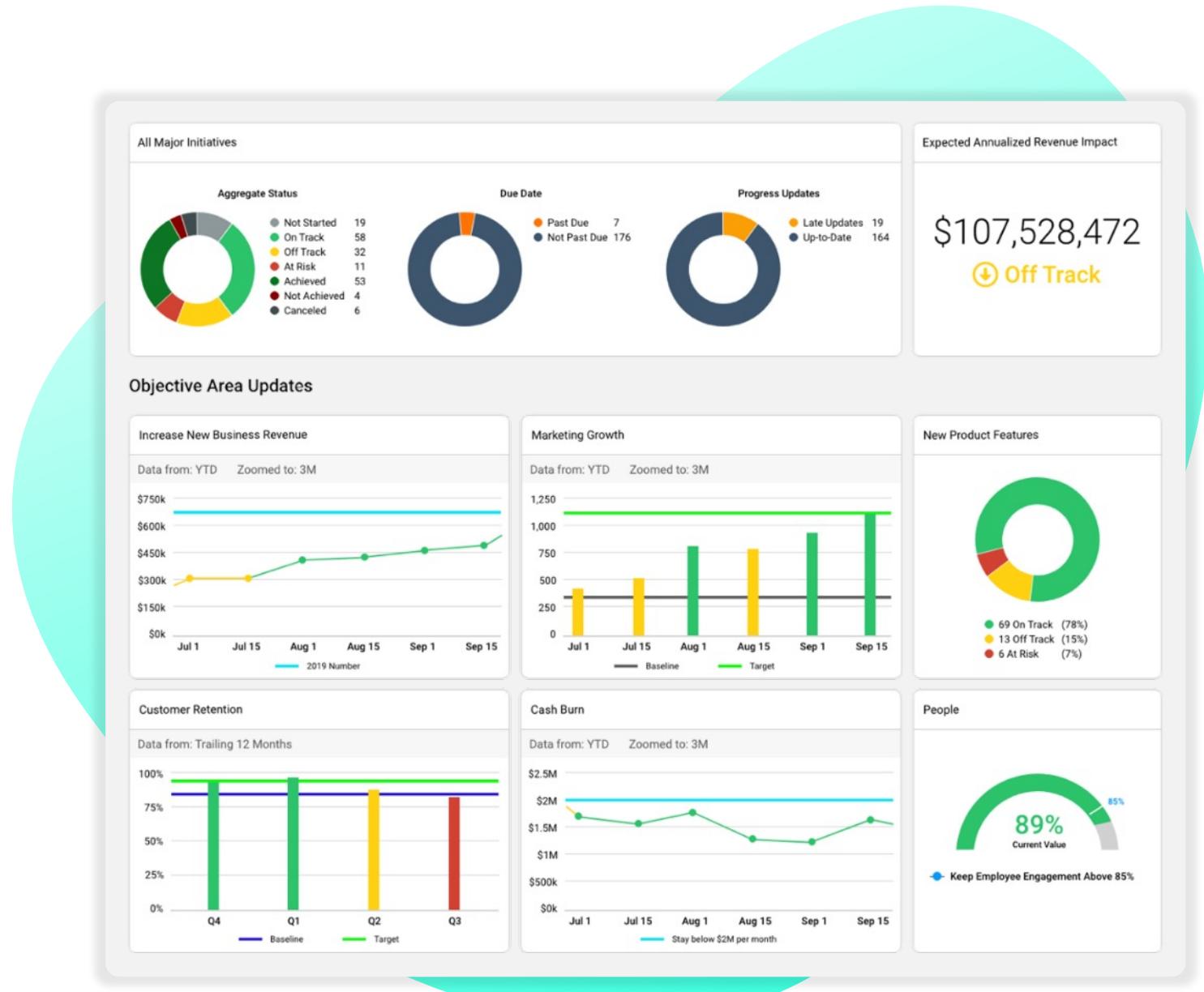
Strategic Plan 2021-2023

Item	Status	End of Period
Enhance Adult and Youth Detention Center internal safety	On Track	2/28/2023
Conduct neighborhood watch meetings	On Track	2/28/2023
Implement the second wildland team	Off Track	2/28/2023
Hazardous fuel acreage mitigated by hand or mechanized means. Target: 10 acres per quarter	Off Track	2/28/2023

Click to Update All

Making it easier to **gather updates** across all departments and plans with the click of a button

**Make key decisions faster**, because you can spot trends, weak spots, and victories in an all-encompassing, multi-plan dashboard.



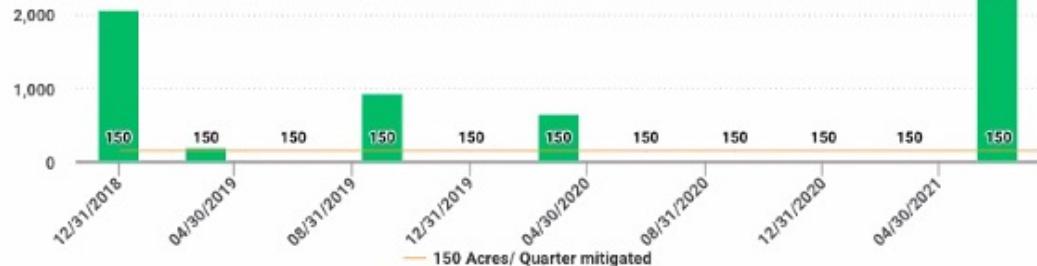
# Connect activities to results, from any number of plans or filters, so you can focus your attention in time to change outcomes.

## Safety

Hazardous fuel acreage mitigated by hand or mechanized means. Target: 10 acr... [...](#)



Hazardous fuel acreage mitigated through the managed use of prescription (Rx) ... [...](#)



Fire & Rescue Performance [...](#)

Name	Status	Last Comment
Enhance Fire Protection Programs	On Track	
Create year-round sustained wildland program	On Track	This is being created and we are coming up with quarterly objectives to sustain the program
Obtain FY2019 funding for six person year round team	Achieved	This was achieved during FY19 and we were able to fund for more than 6 individuals based on a dire need for more team members
Reclassify temporary positions to permanent for six person team and fill	Achieved	These roles went from temporary contracts to perm roles in June 2021; all individuals will receive full benefits and a pension after a certain time in seat
Identify and request FY2020 funding to support second year round wildland team	Off Track	This is being moved to request for FY2022 in June for a second team - funds had to be allocated elsewhere
Number of local, regional, and national fire suppression deployments. Target NA	On Track	We have consistently stayed above a baseline of zero in this measure
Implement the second wildland team	Off Track	@Amanda Cyr (AchieveIt Admin) please re-do your update with more information

**Easily drill into past and current contextual evidence, instead of manually searching for a spreadsheet from four months ago.**

## Implement Executive Outreach Program



Jane Conner updated the status to At Risk with a value of 3.

While we thought after last month we were well positioned for a good month, unfortunately we've struggled with engagement. While we've had many conversations, we haven't been able to solidify dates. I believe we need to reassess our strategy and engagement and determine if we need additional help from our C-Suite to generate some additional excitement. View

7/1

Submitted 7/6 at 8:59 AM

Jane Conner updated the status to Off Track with a value of 4.

The executive team has reached out to 15 customers. We completed 4 meetings last month and already have 2 scheduled for this month. Customer reaction has been very positive, even resulting in an upsell last week. This will continue to be a priority for the executive team moving forward. View

4/1

Submitted 4/1 at 3:22 PM

Jane Conner updated the status to On Track with a value of 7.

Jane Conner request:

Charles, we're ramping up the executive reach out session to improve relationships with some of our key customers. Can you send me a list of the top 25 customers that you'd like prioritized? View

Charles Walker response:

Jane, this is a great initiative. I've attached the customers that I'd like to have the team reach out to first. I've also added some context around each so they can be more prepared. View

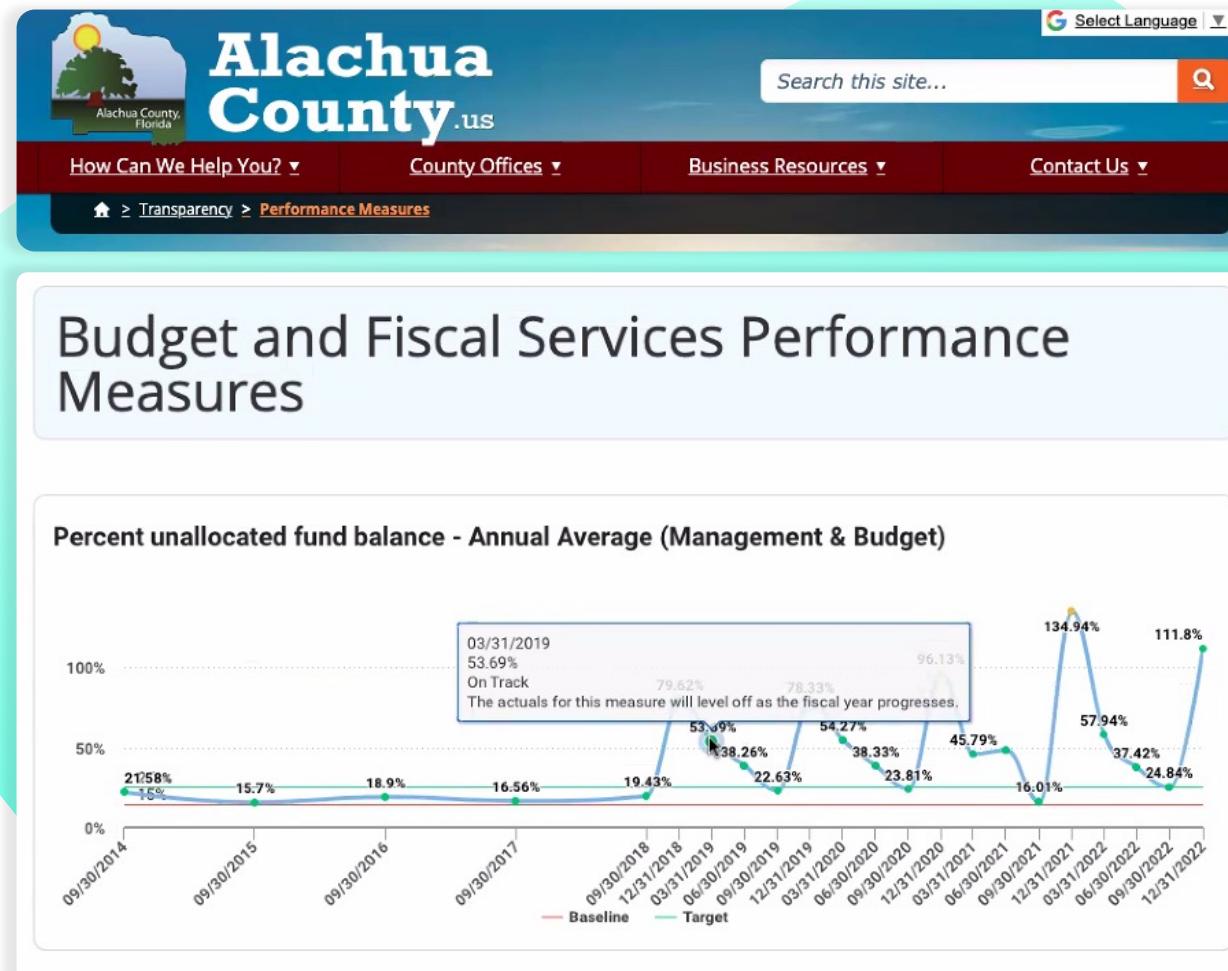


[Major customer executives.xlsx](#)

1/1

Submitted 1/3 at 9:43 AM

Embed dashboard widgets to your website for a more transparent government.  
*Below is the Alachua County Example:*



# ACHIEVEIT IS PURPOSE-BUILT TO SOLVE THESE CHALLENGES

Achieveit is a cloud-based platform that improves results around **Strategy Execution and Performance Measures** by helping organizations effectively connect, manage, and execute on plans and initiatives.

## CUSTOMERS

### STATES



### COUNTIES



### CITIES



### HIGHER EDUCATION



### SPECIAL DISTRICTS & COMMISSIONS



## SECURITY

### HOSTING



**Microsoft Azure Government Cloud** environment

### CERTIFICATIONS



**SOC 2 TYPE II CERTIFIED**

**SOC 2 Type II** audited with no exceptions



**FedRAMP** Low-Impact level Authorized (*public cloud*)



## PROCUREMENT

### DIRECT PURCHASE OR CONTRACT VEHICLES



ILLINOIS LEARNING  
**TECHNOLOGY**  
PURCHASE PROGRAM

# THANK YOU!

- » If interested in receiving a copy of this presentation or other helpful resources, please let me know.
- » A Capability Statement is available with more information and website details.
- » If interested in scheduling a demo to learn more, let's chat to schedule or book directly below:



<https://calendly.com/acyr/achieveit-demo>

