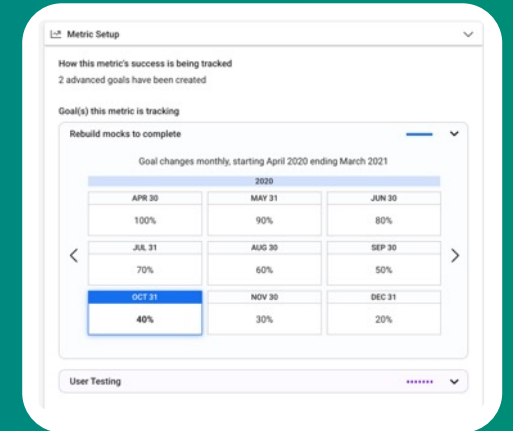
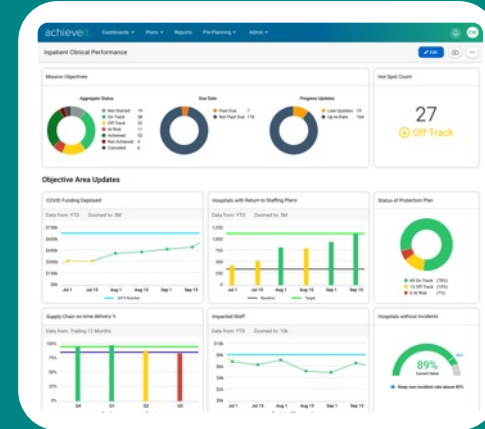
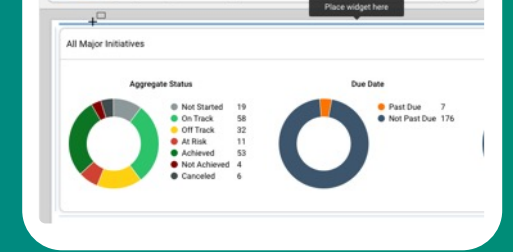
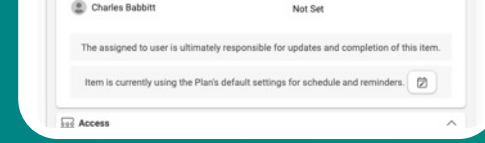


WASHINGTON ASSOCIATION OF COUNTY OFFICIALS

STRATEGIC PLANNING FOR YOUR ORGANIZATION: BRIDGING THE GAP

FEBRUARY 13TH 2024

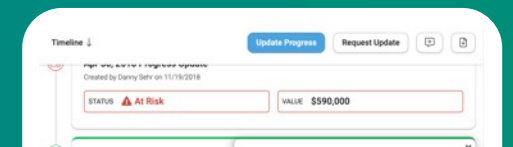
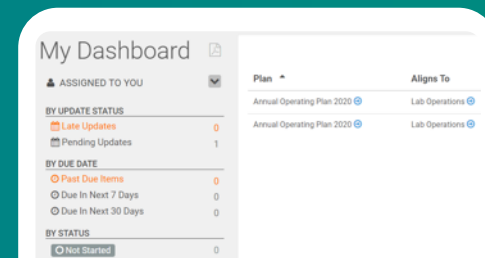
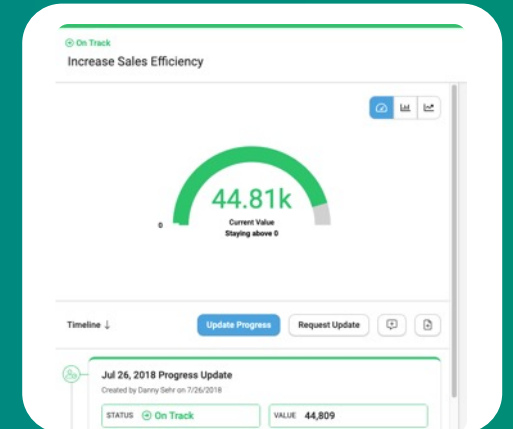


achieveit Dashboards Plans Reports Admin

2020 Strategic Plan
Created by Danny Sehr

No filters applied. Add Filters

#	Level	Name	Status
	Plan	2020 Strategic Plan	On Track
1	Strategic Pillar	Revenue Growth	Not Started
1.1	Objective	Increase Existing Markets Revenue for 2020 H1	Not Started
1.1.1	Project	Target Growth Campaign for Existing Customers	Not Started
1.2	Objective	Increase International Revenue	Not Started
1.3	Objective	Increase New Markets Revenue	Not Started
1.4	Objective	Increase New Business Revenue by 10%	Not Started
1.5	Project	Increase Revenue from New Products	On Track



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

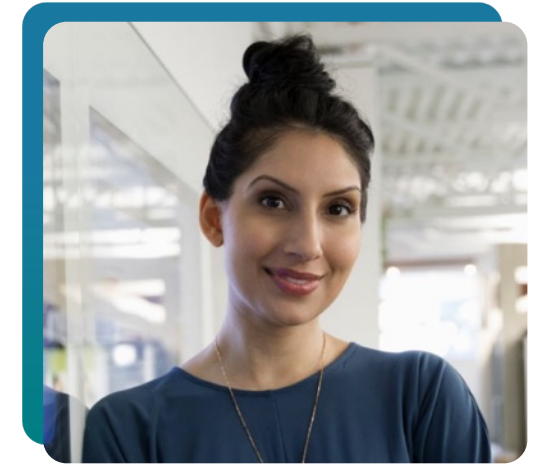


THE TRANSLATOR

Assigns work and makes sure it's getting done

CHALLENGES

- » Herds cats
- » Responsibility with potentially limited authority



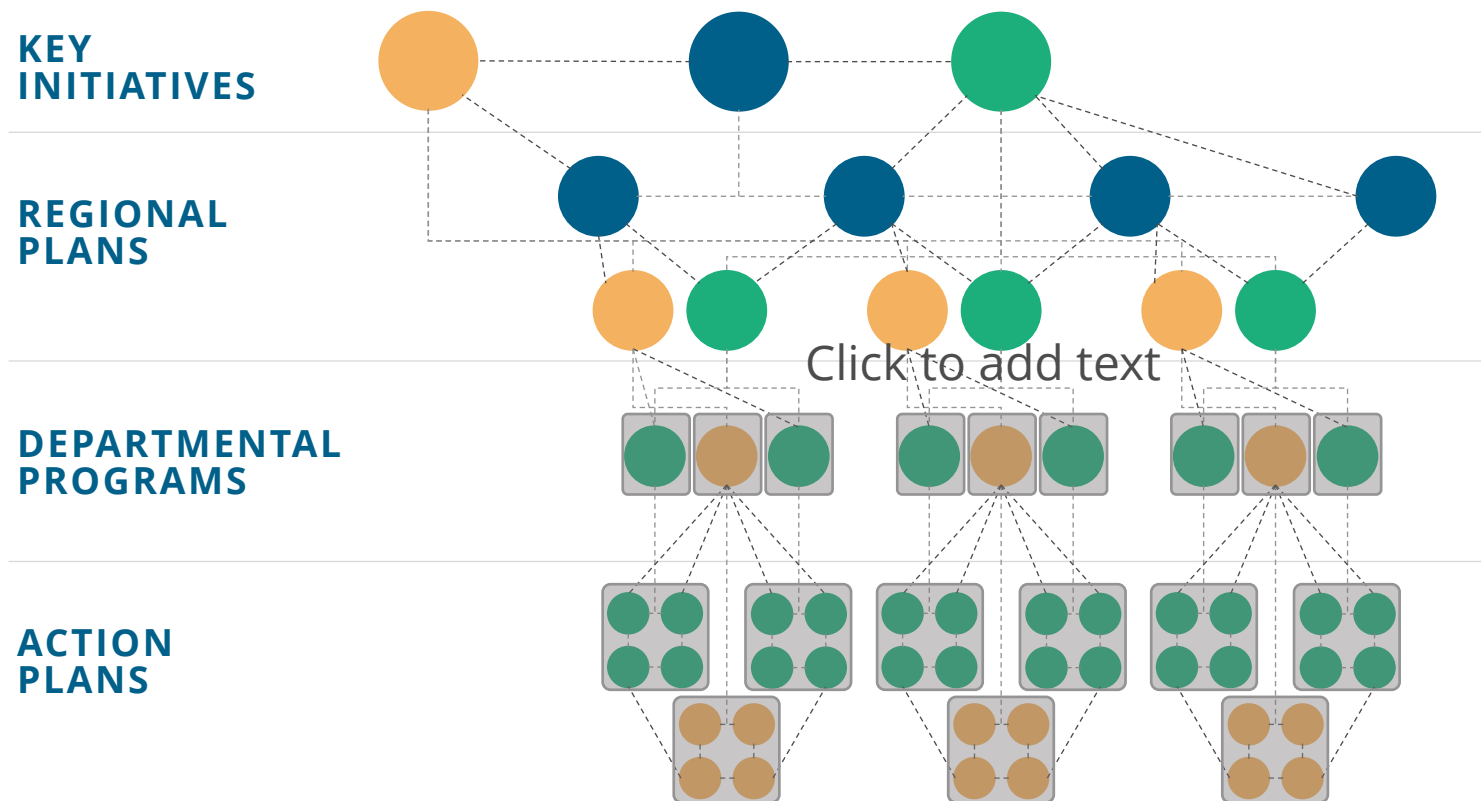
THE DOER

Actually does the work

CHALLENGES

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

THE NIGHTMARE OF MANAGING INTEGRATED PLANS



- Inconsistent **communication**
- Limited **alignment & uniformity**
- Poor **visibility** across stove pipes
- Poor **accountability**
- Manual **processes**
- Lengthy **reporting** cycle

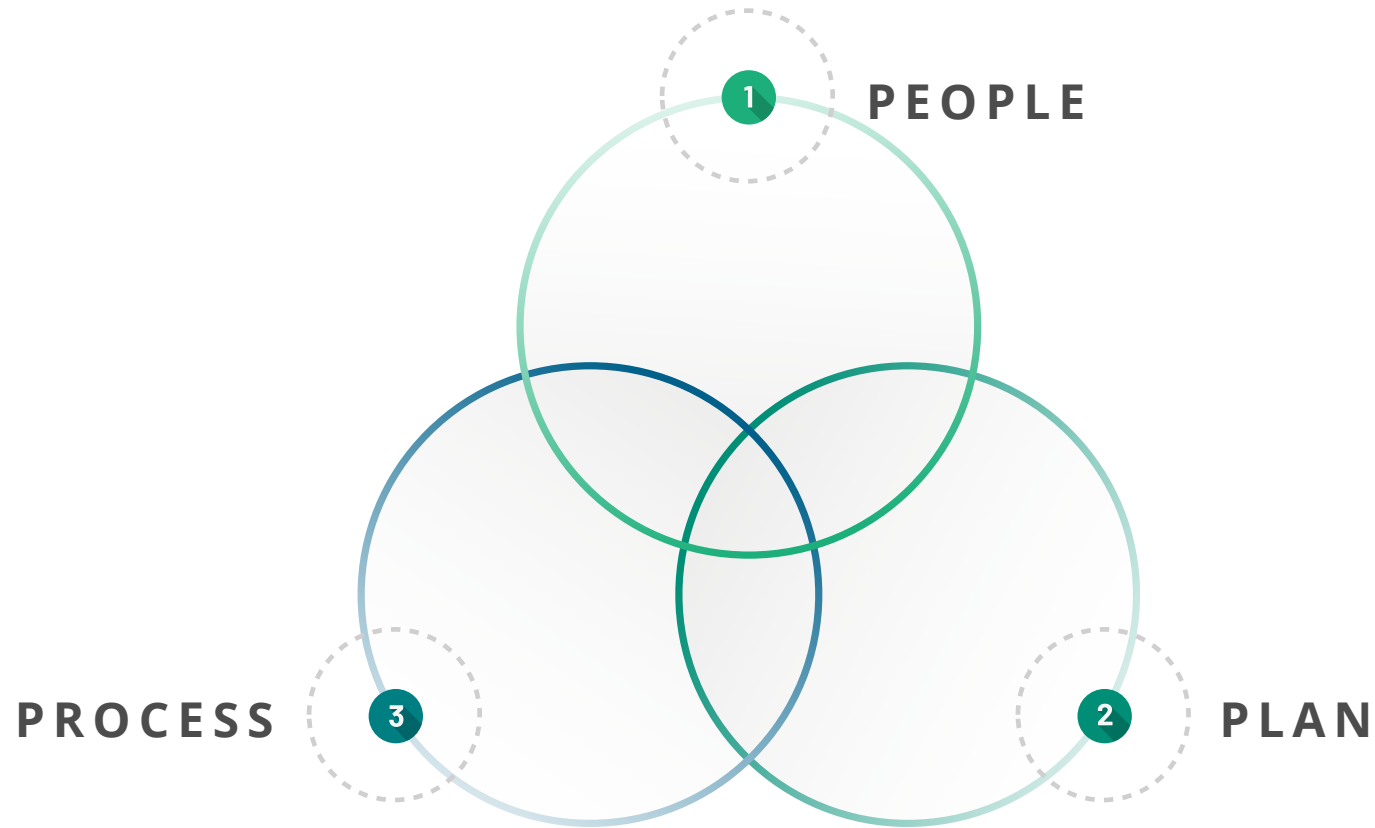
INTEGRATED PLAN MANAGEMENT

STRATEGIC
PLANNING



PROJECT
MANAGEMENT

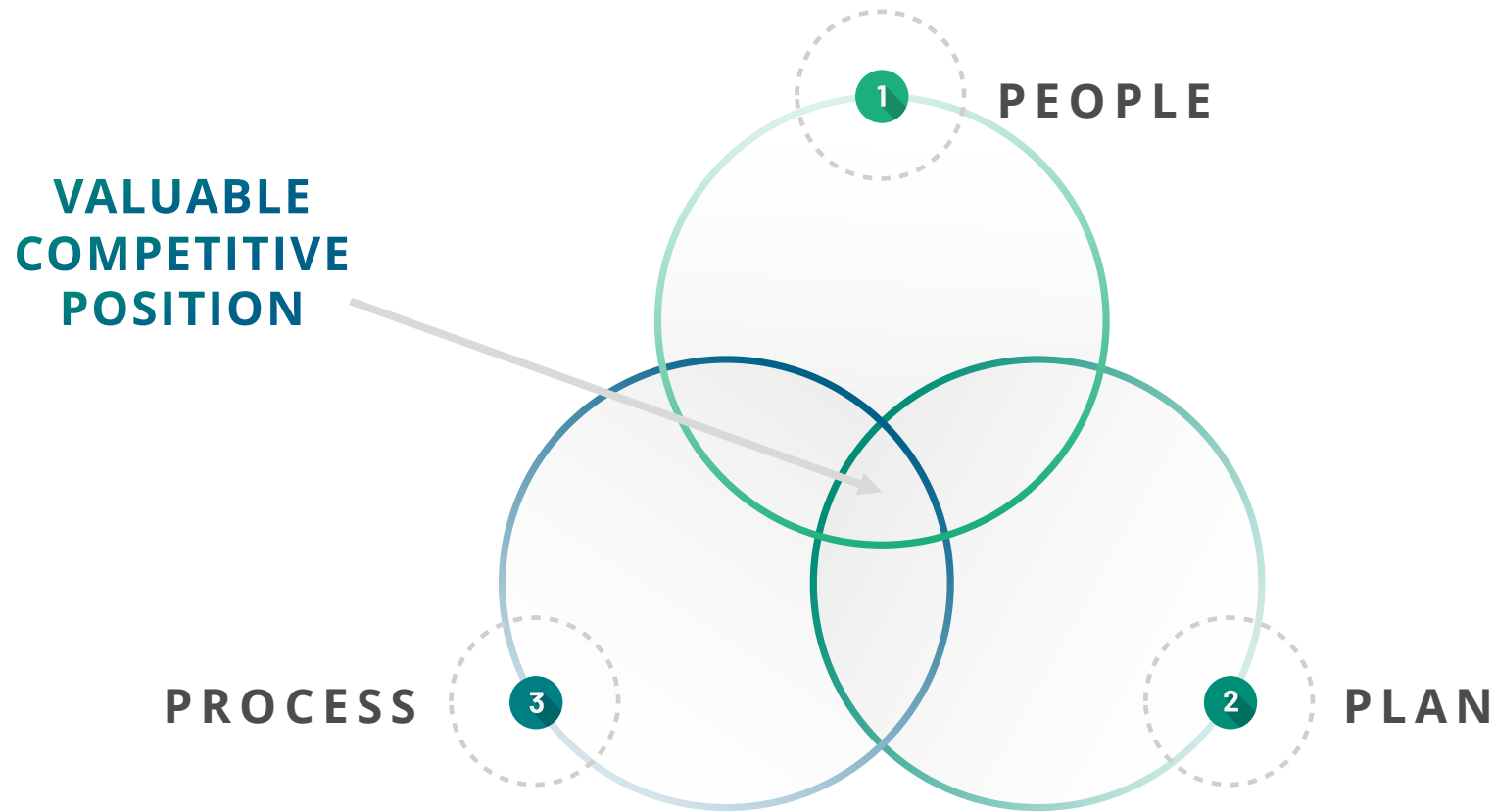
THE PROBLEM



SUCCESSFUL EXECUTION TAKES ALL 3

STRATEGY EXECUTION

WHY IS EXECUTION IMPORTANT?



THE 5 ELEMENTS EVERY PLAN SHOULD HAVE

THE 5 ELEMENTS EVERY PLAN NEEDS



1

Quantitative
Outcomes

2

Ownership

3

Due Dates

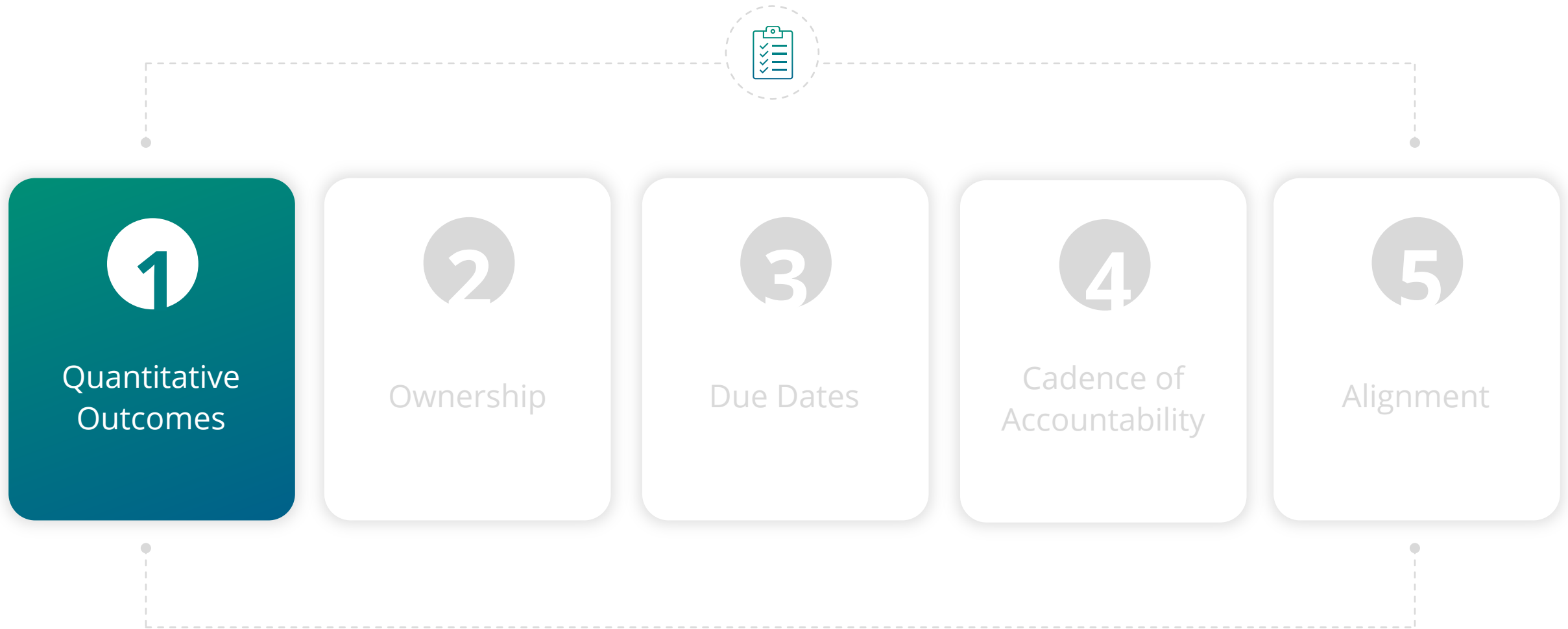
4

Cadence of
Accountability

5

Alignment

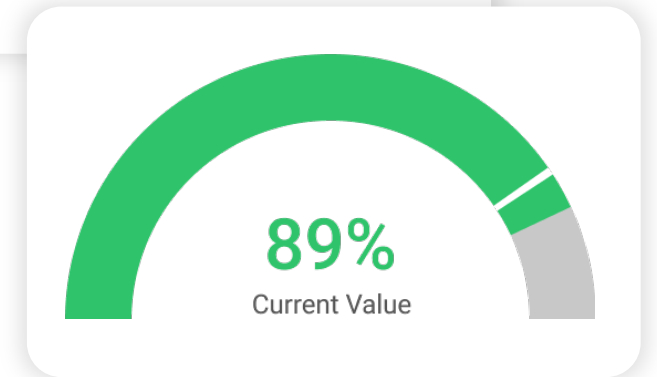
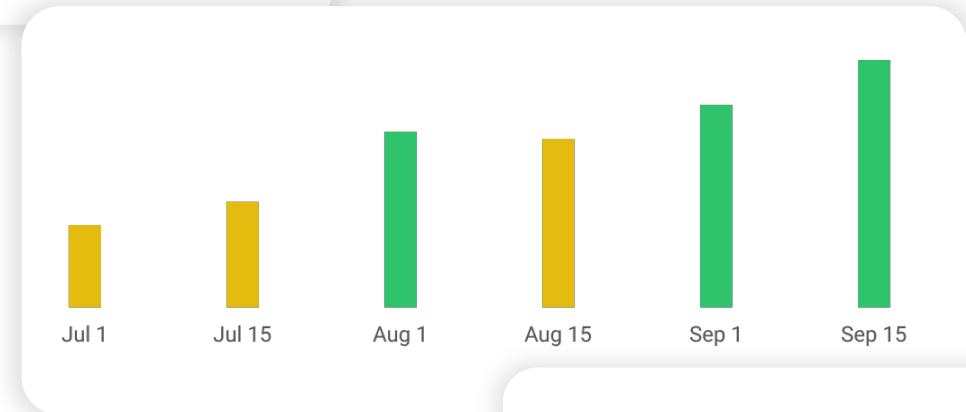
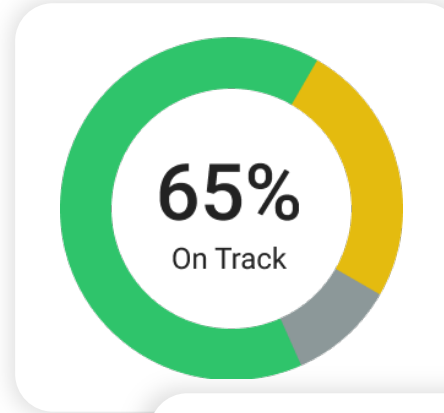
THE 5 ELEMENTS EVERY PLAN NEEDS



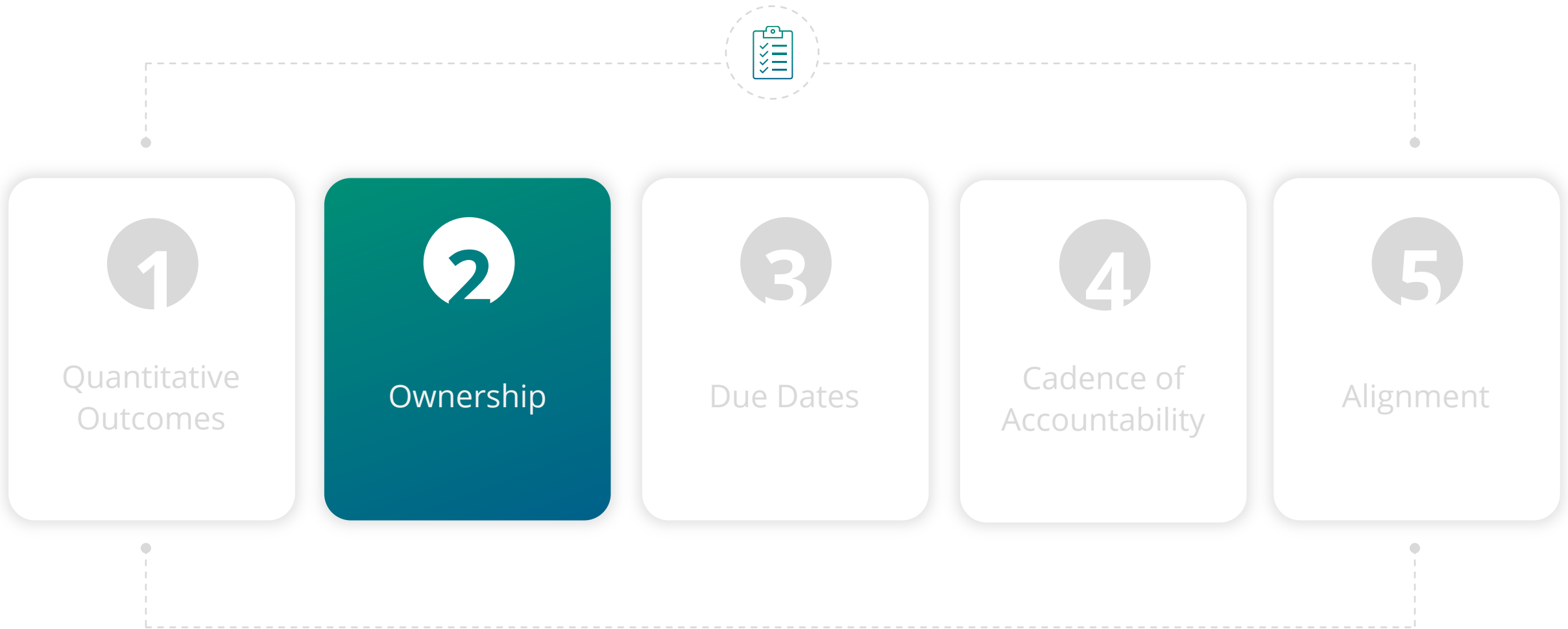
1

QUANTITATIVE OUTCOMES

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



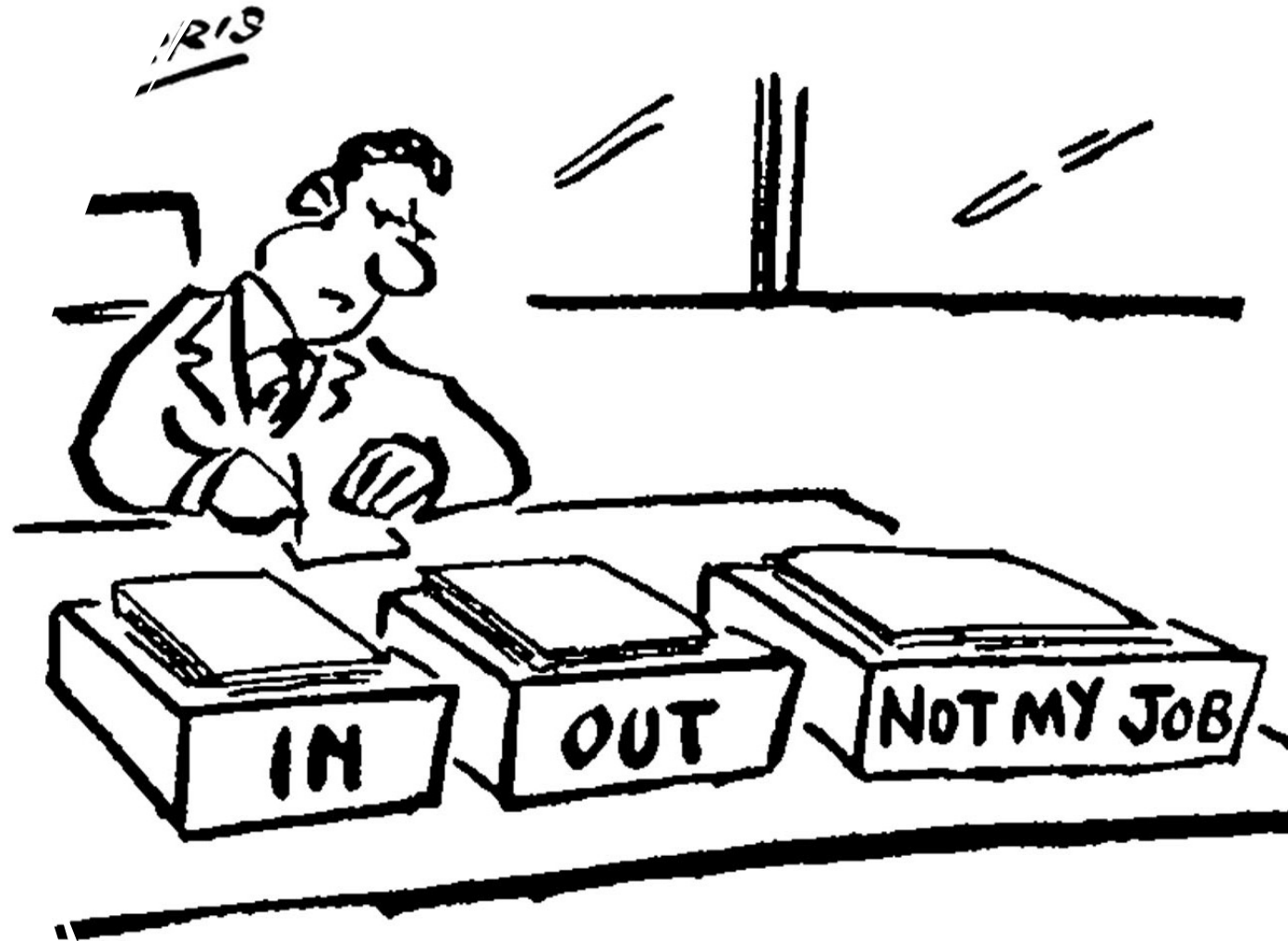
THE 5 ELEMENTS EVERY PLAN NEEDS





OWNERSHIP

- » No owners
- » Too many owners



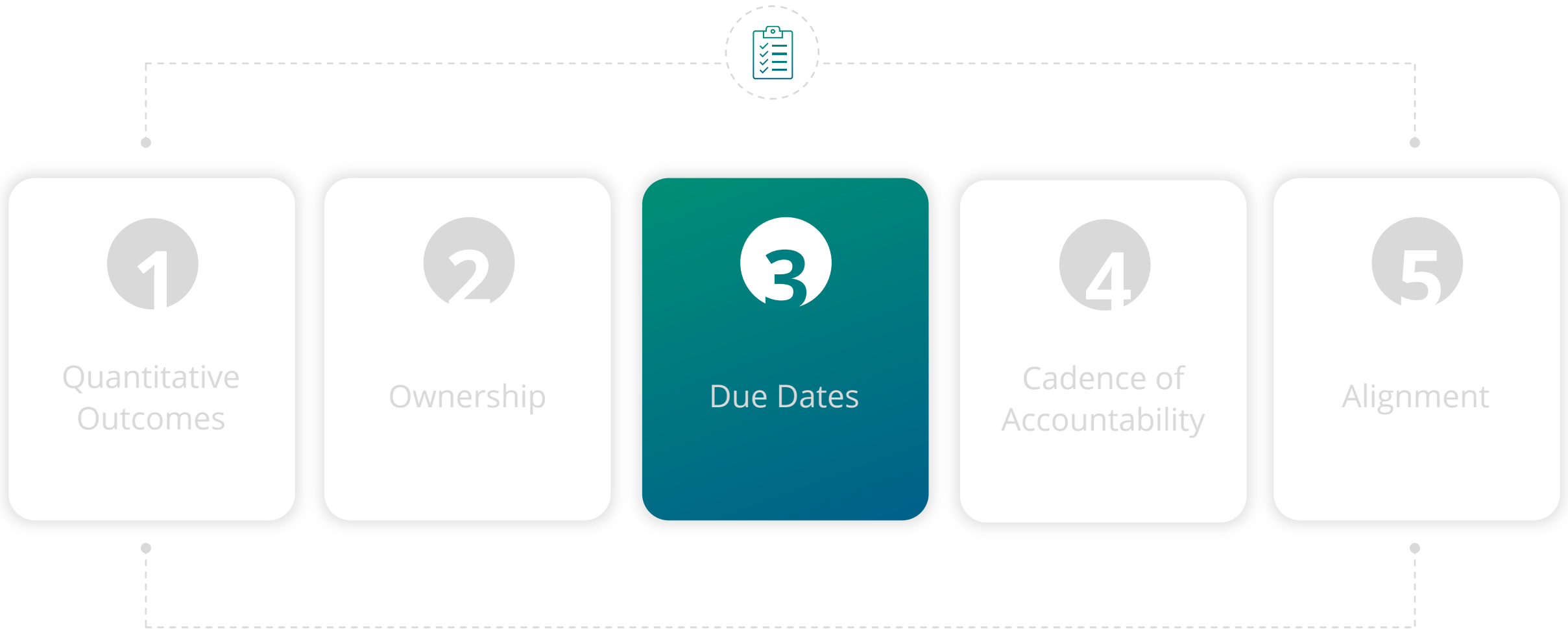
accountability **noun**

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



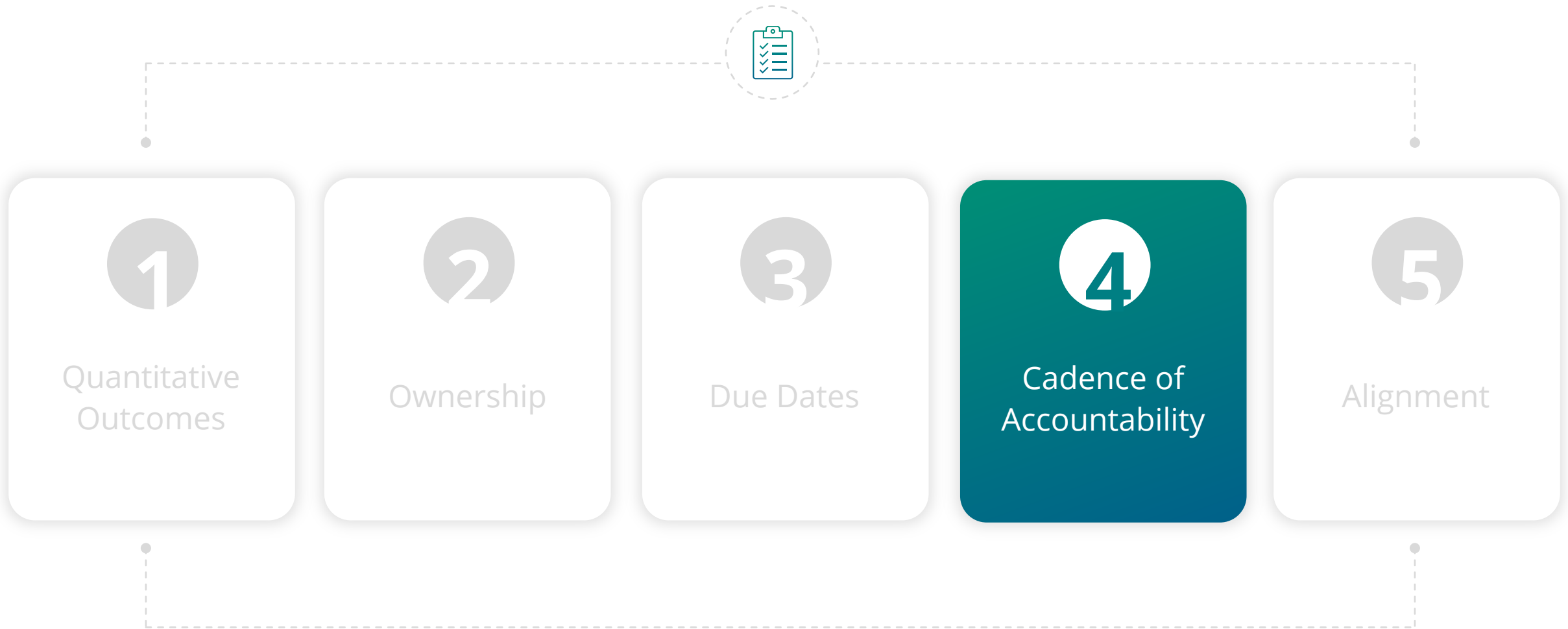
3

DUE DATES

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



THE 5 ELEMENTS EVERY PLAN NEEDS



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

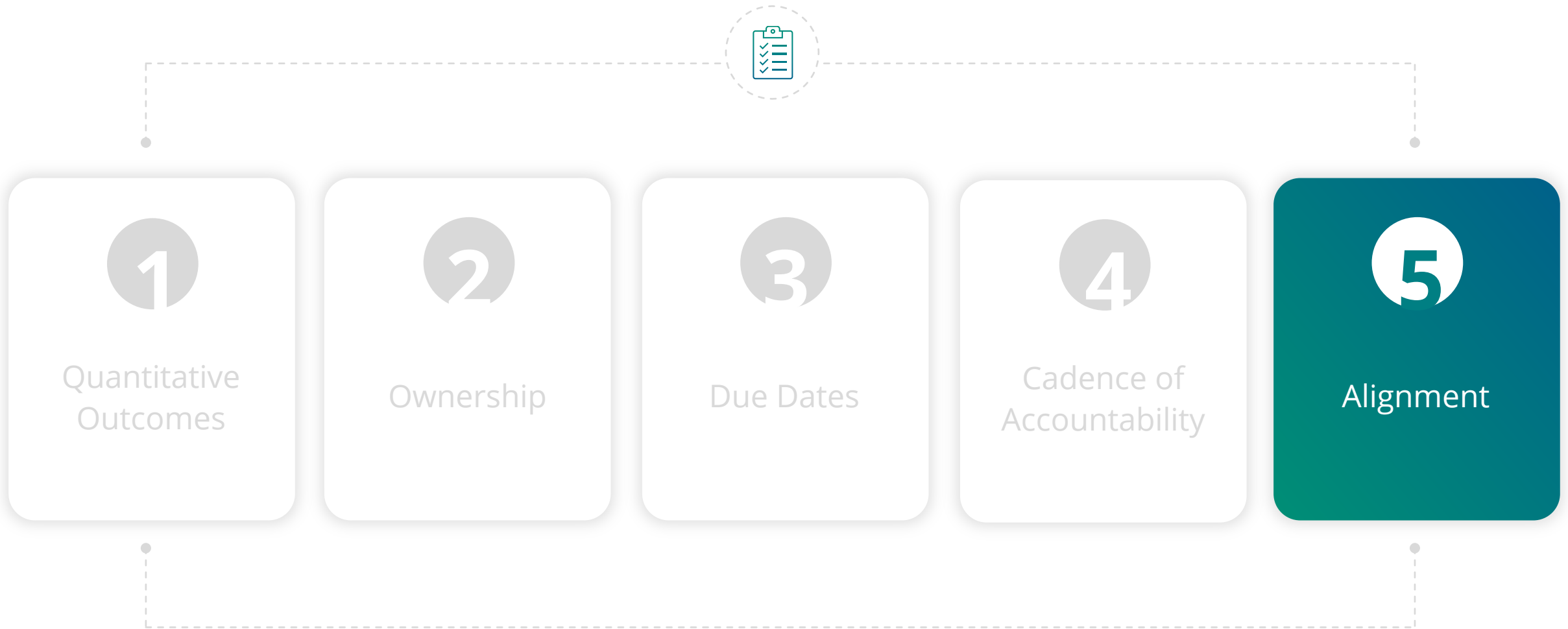


From

Due Date

To

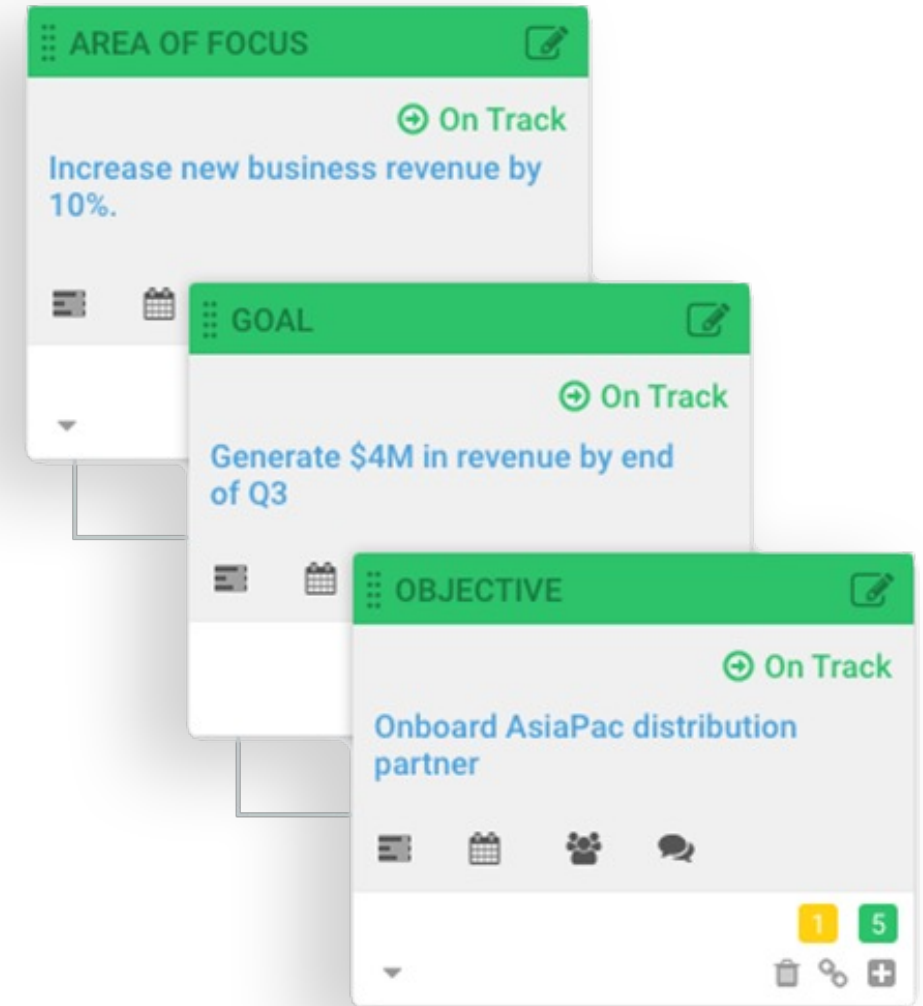
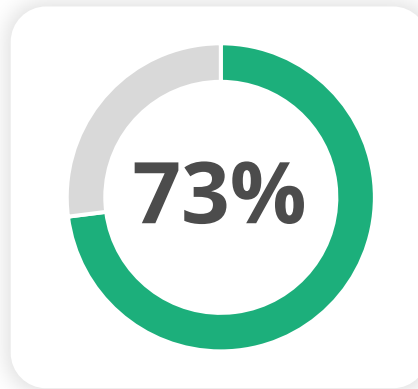
THE 5 ELEMENTS EVERY PLAN NEEDS



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

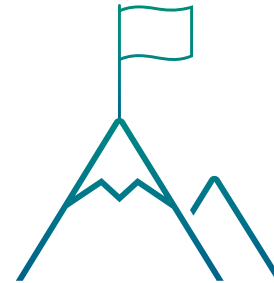


**LITTLE IS DONE TO
TRACK PERFORMANCE,**
being busy is often mistaken for
being strategic, and a lot gets
done with little accomplished.

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

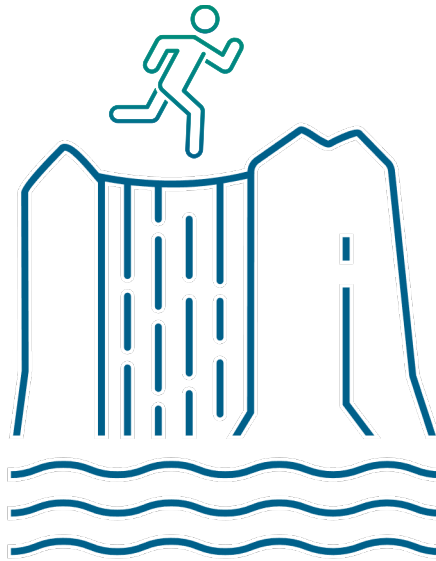


ASSIGN
firm due dates



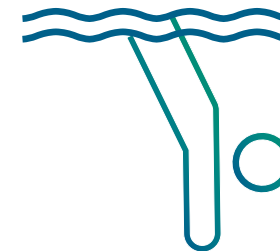
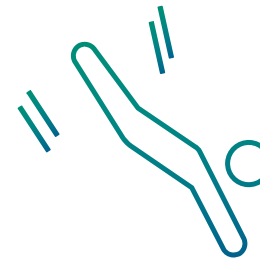
STAGE THREE

CULTURE OF **EXECUTION**



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

DIVING INTO THIS STAGE
involves two factors



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



1

Quantitative
Outcomes

2

Ownership

3

Due Dates

4

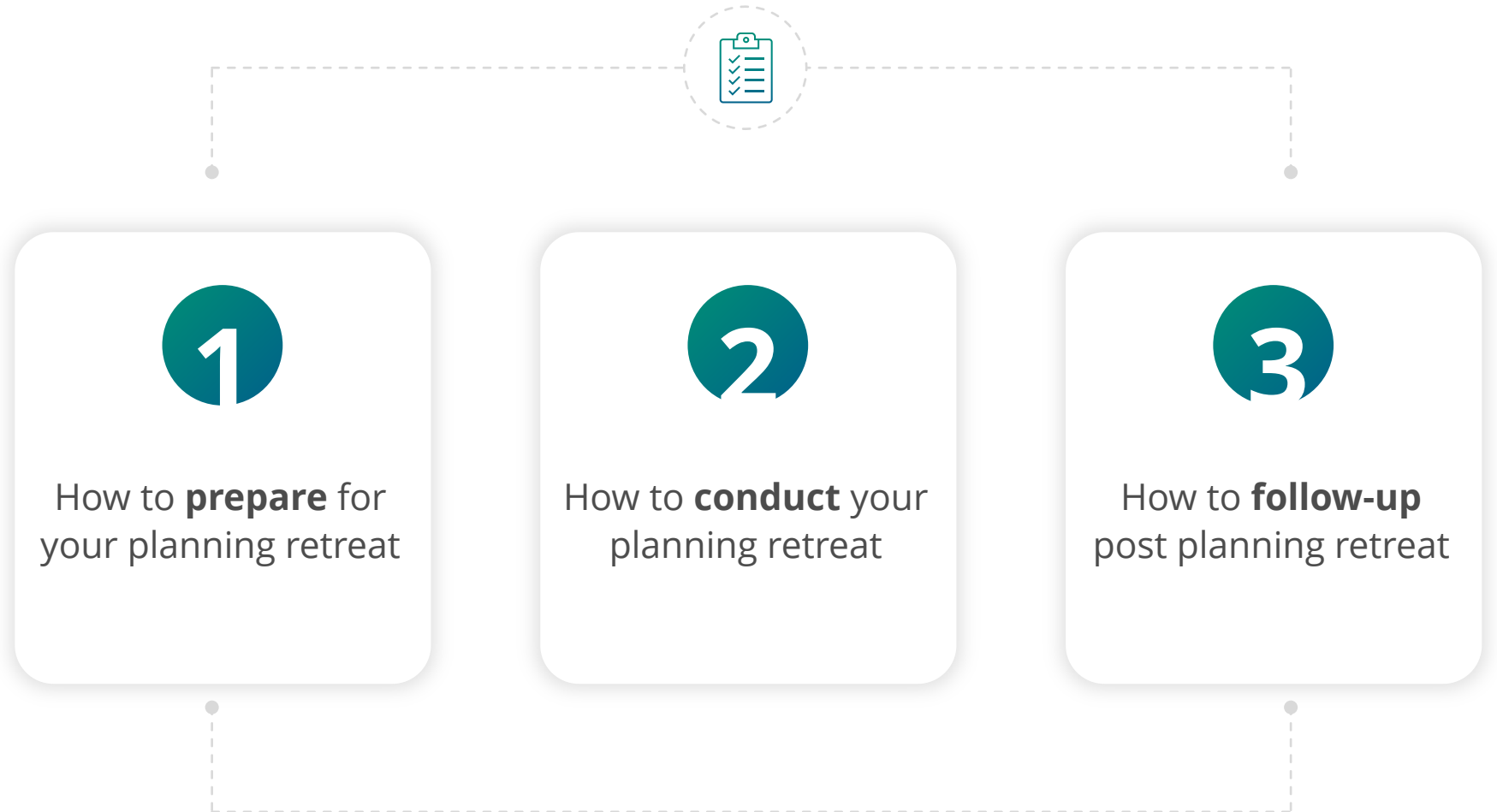
Cadence of
Accountability

5

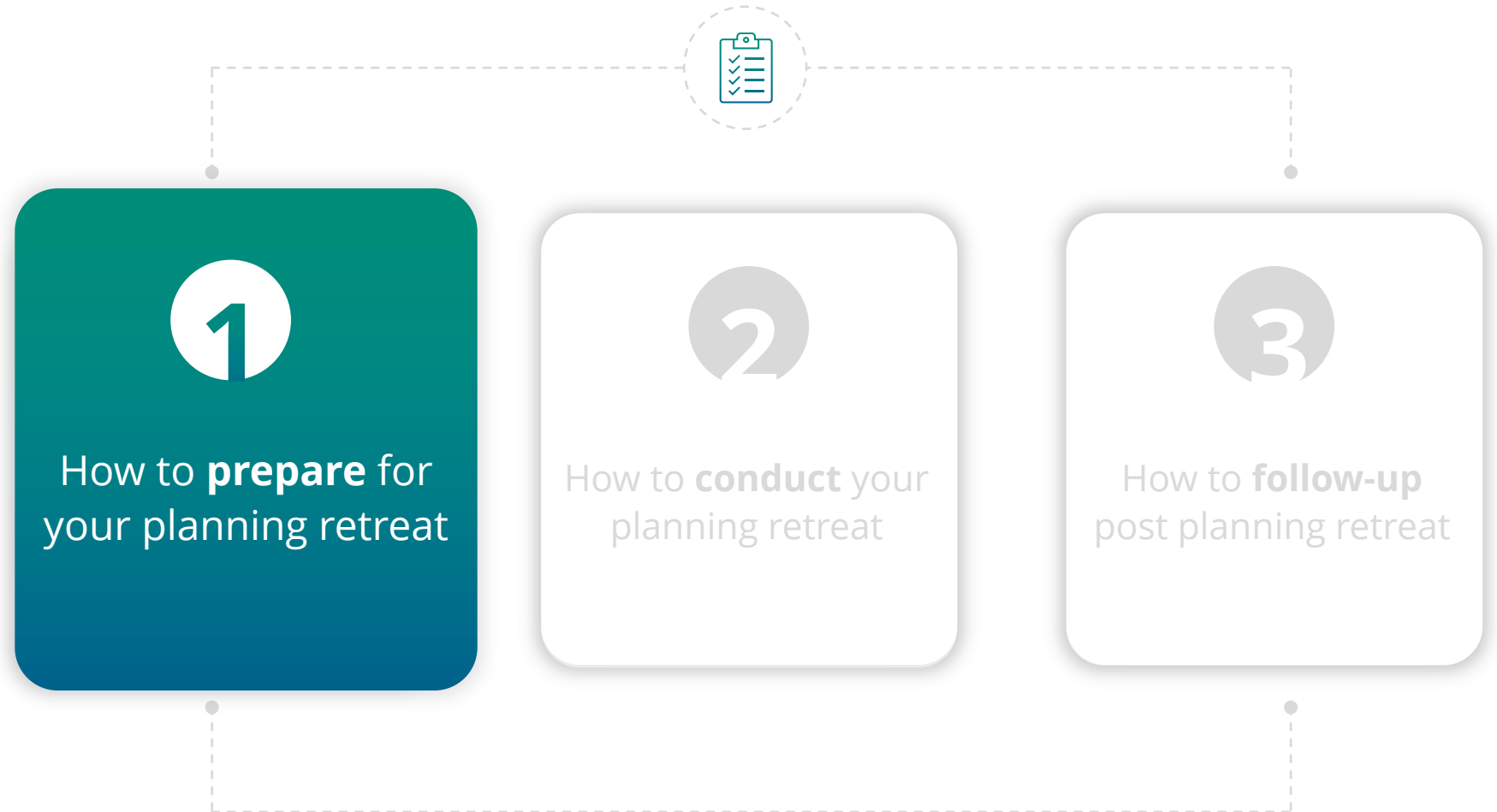
Alignment

HOW TO BUILD YOUR PLAN AND PERFORMANCE METRICS

THREE STEPS TO PREPARE FOR YOUR PLANNING RETREAT



PRINCIPLES COVERED TODAY



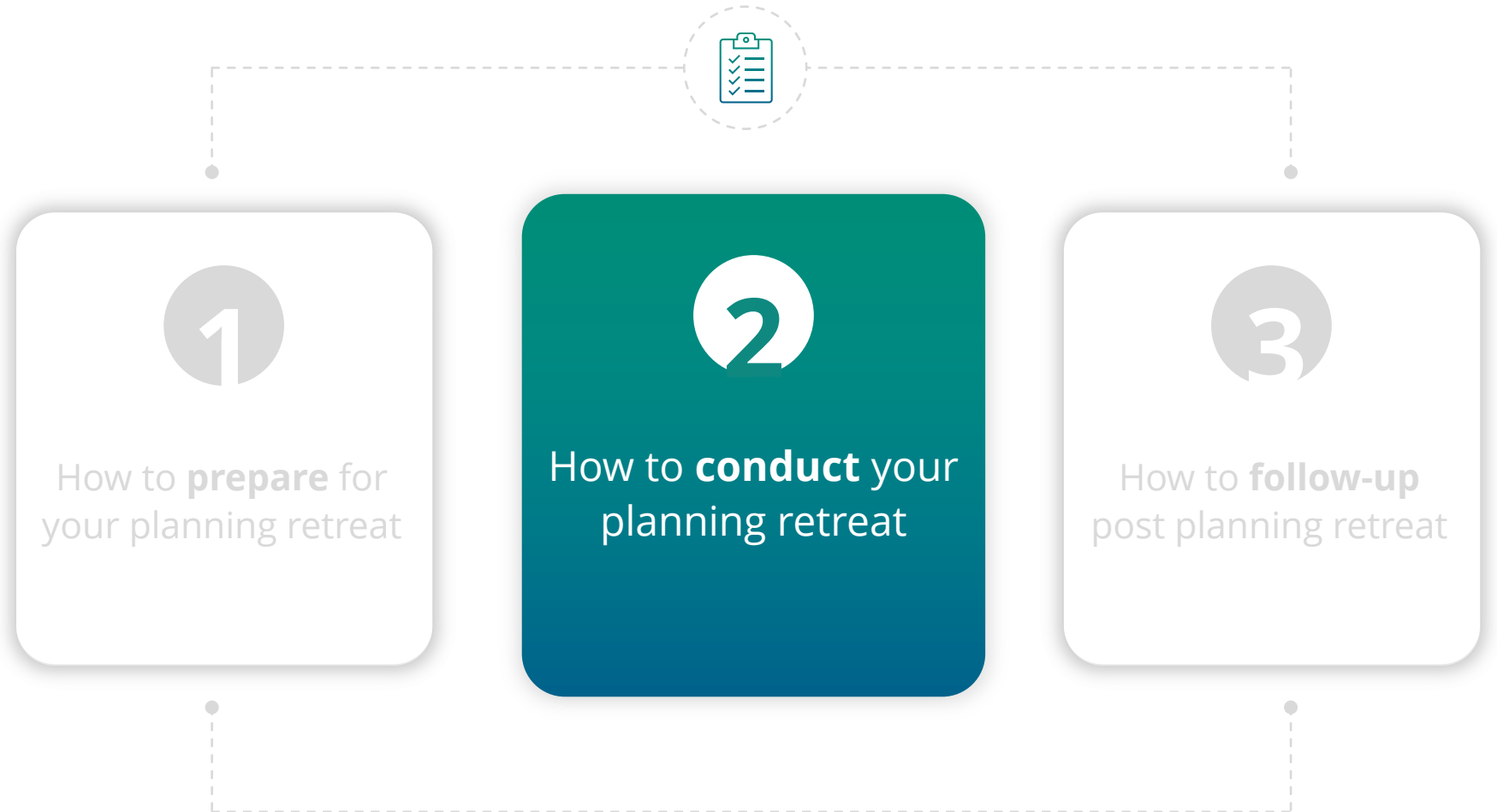
01

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



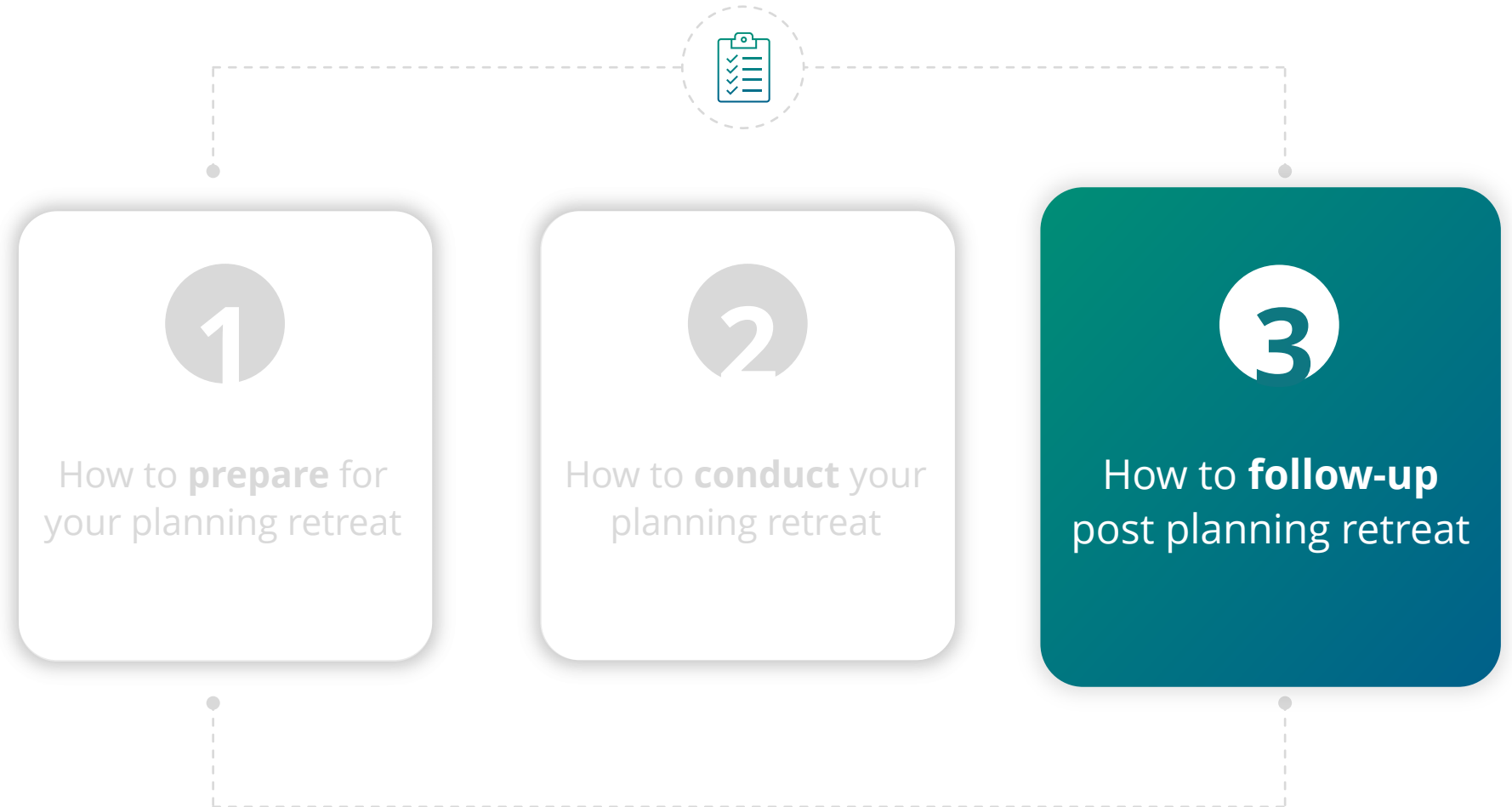


02

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:

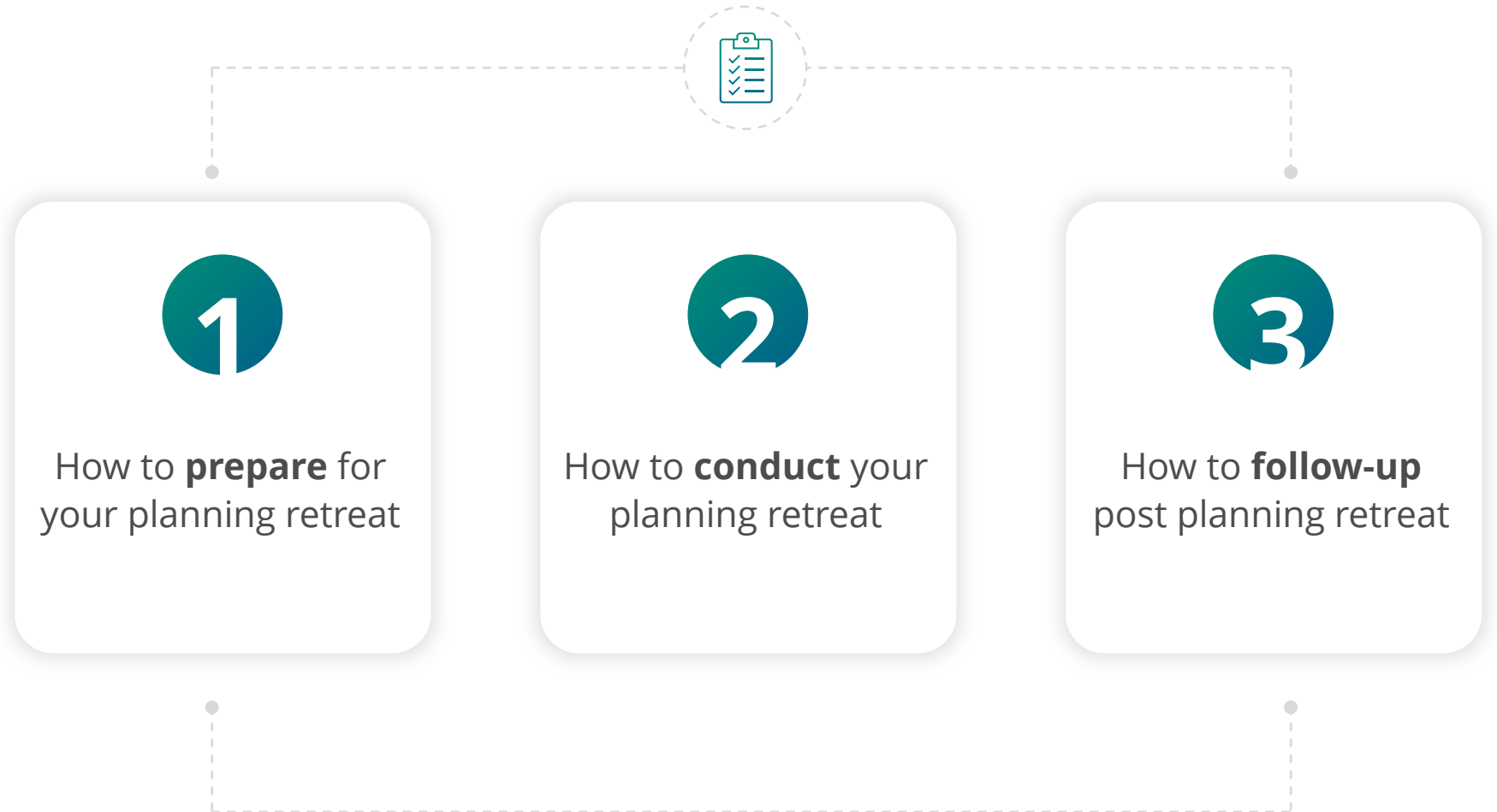
- Yield better results
- Increase buy in
- Create a clear sense of ownership & understanding

03

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

- Where
- Who
- How
- What

PRINCIPLES COVERED TODAY



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"> 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. 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.

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: Amanda (a@achieveit.com))

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 \$110,000	\$119,765	4/19/2021
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	1/6/2018	1/6/2018	Stay between baseline of 0% and target of 100%	100%	
1.1.1.1.2	Initiative	Execution	On Track					
1.1.1.1.3	Initiative	Add new sales team and training sessions	Not Achieved	7/6/2018	8/6/2019	Stay between baseline of 0 and target of 15	14	
1.1.2	Objective	Product Beta Sales Revenue	Achieved	1/1/2018	8/29/2019			
1.1.2.1	Initiative	Reach out to 100 new customers	On Track	5/31/2018	12/31/2021	Stay between baseline of 40 and target of 100	83	
1.1.2.2	Initiative	Revenue Cycle Management Project	Achieved	1/1/2018	10/15/2018			
1.2	Goal	Increase Market Share by 7.5%	On Track	1/1/2018	12/31/2021	Stay between baseline of 0% and target of 7.5%	6.2%	
1.2.1	Objective	Acquire 80% of Regional Prospects	Off Track	4/17/2018	12/31/2021	Stay between baseline of 60% and target of 80%	70%	
1.2.1.1	Initiative	Deploy Account Based Marketing Campaigns	Achieved	1/1/2018	2/4/2019			

WHAT MAKES A STRONG PLAN?

5 KEY ELEMENTS FOR SUCCESS



ALIGNMENT



ASSIGNED TO USER



START & DUE DATES



QUANTIFIABLE OUTCOMES

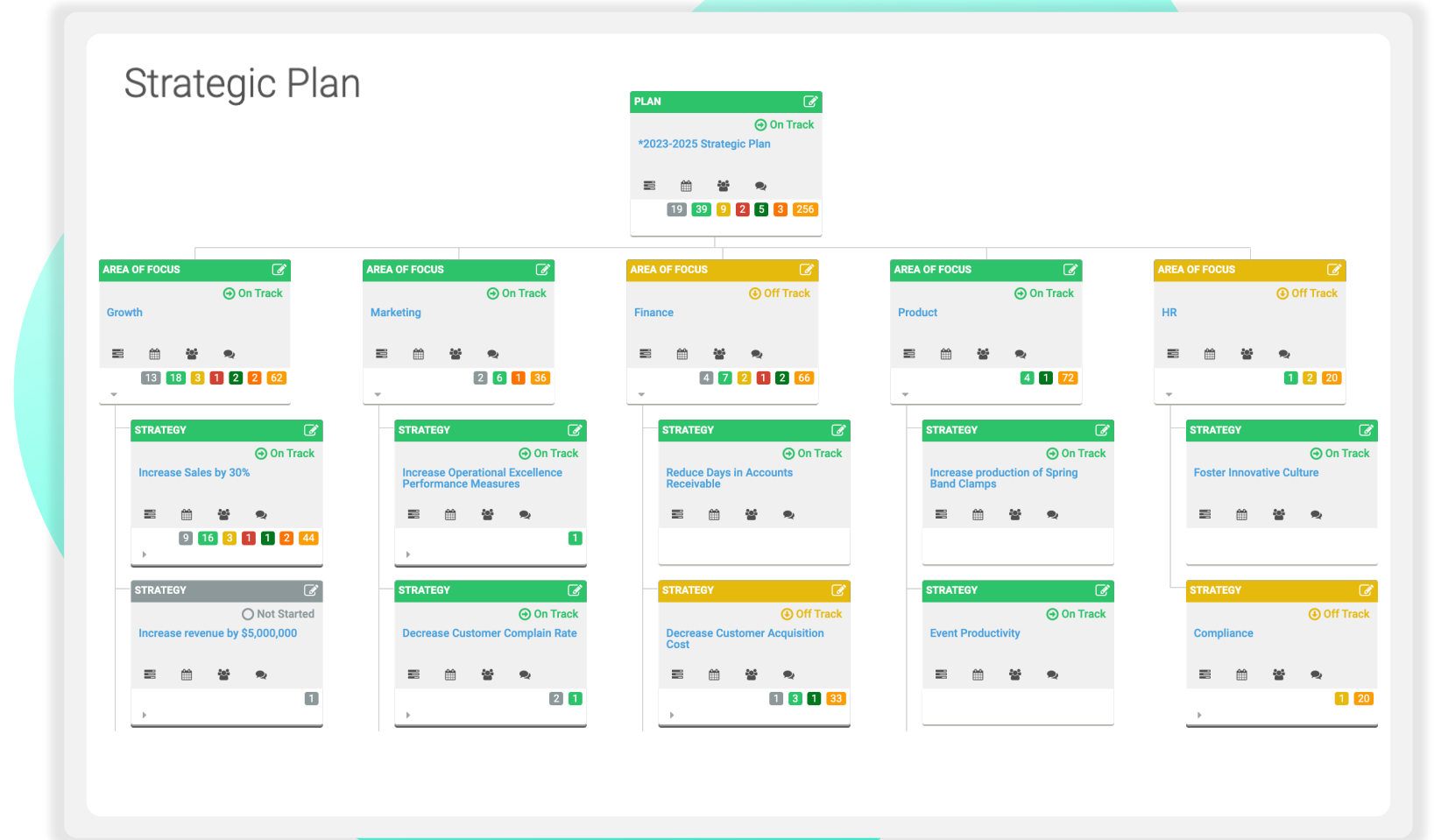


FREQUENCY

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

 **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](#)

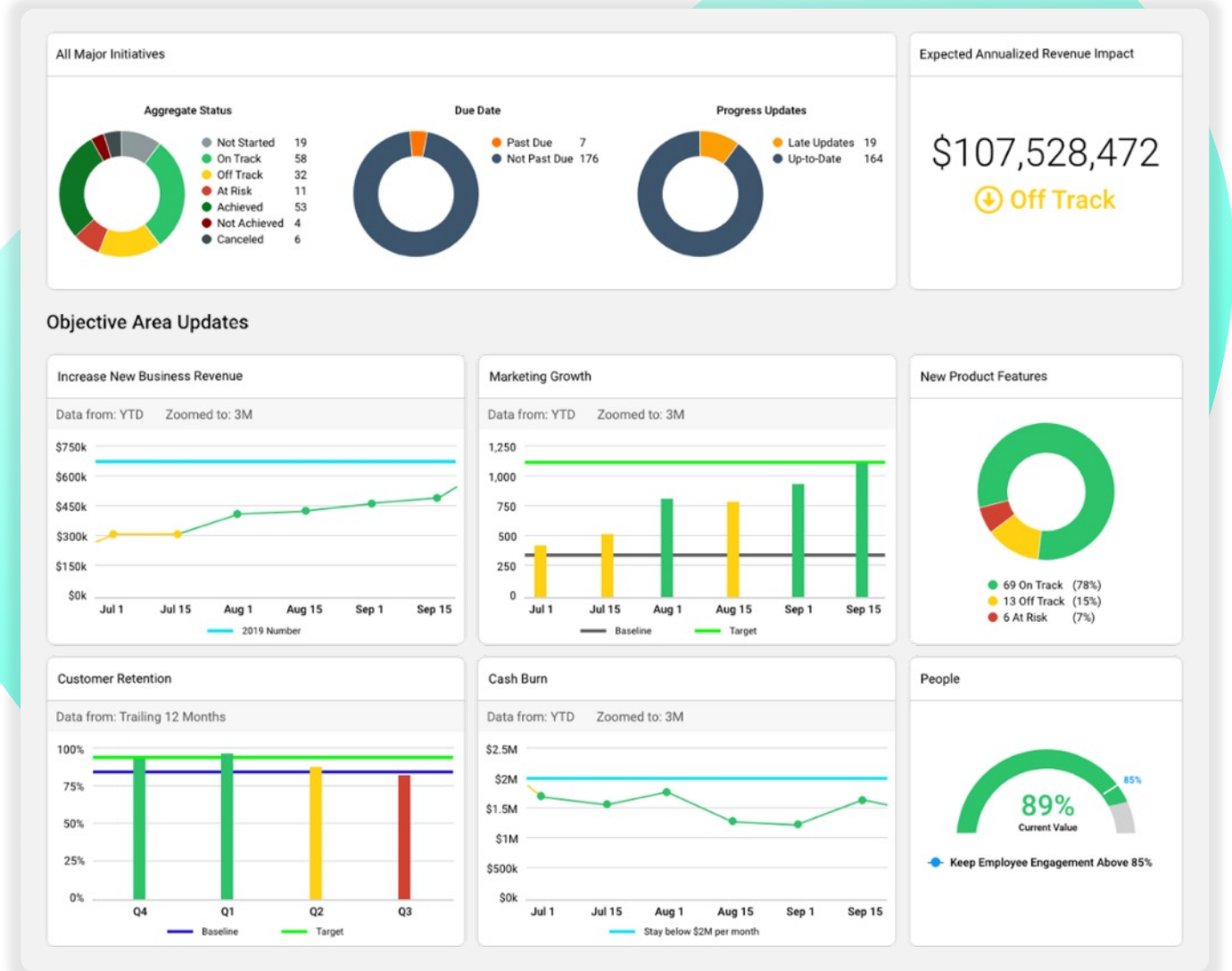
Strategic Plan 2021-2023

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.



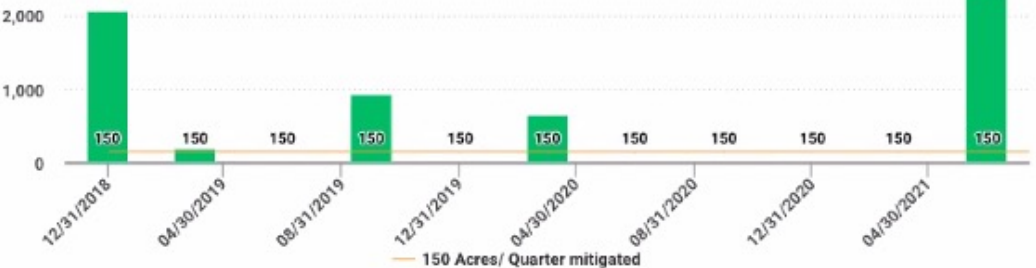
Connect activities to results, from any number of plans or filters, so you can focus your attention in time to change outcomes.

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. ”

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. ”

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? ”

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. ”

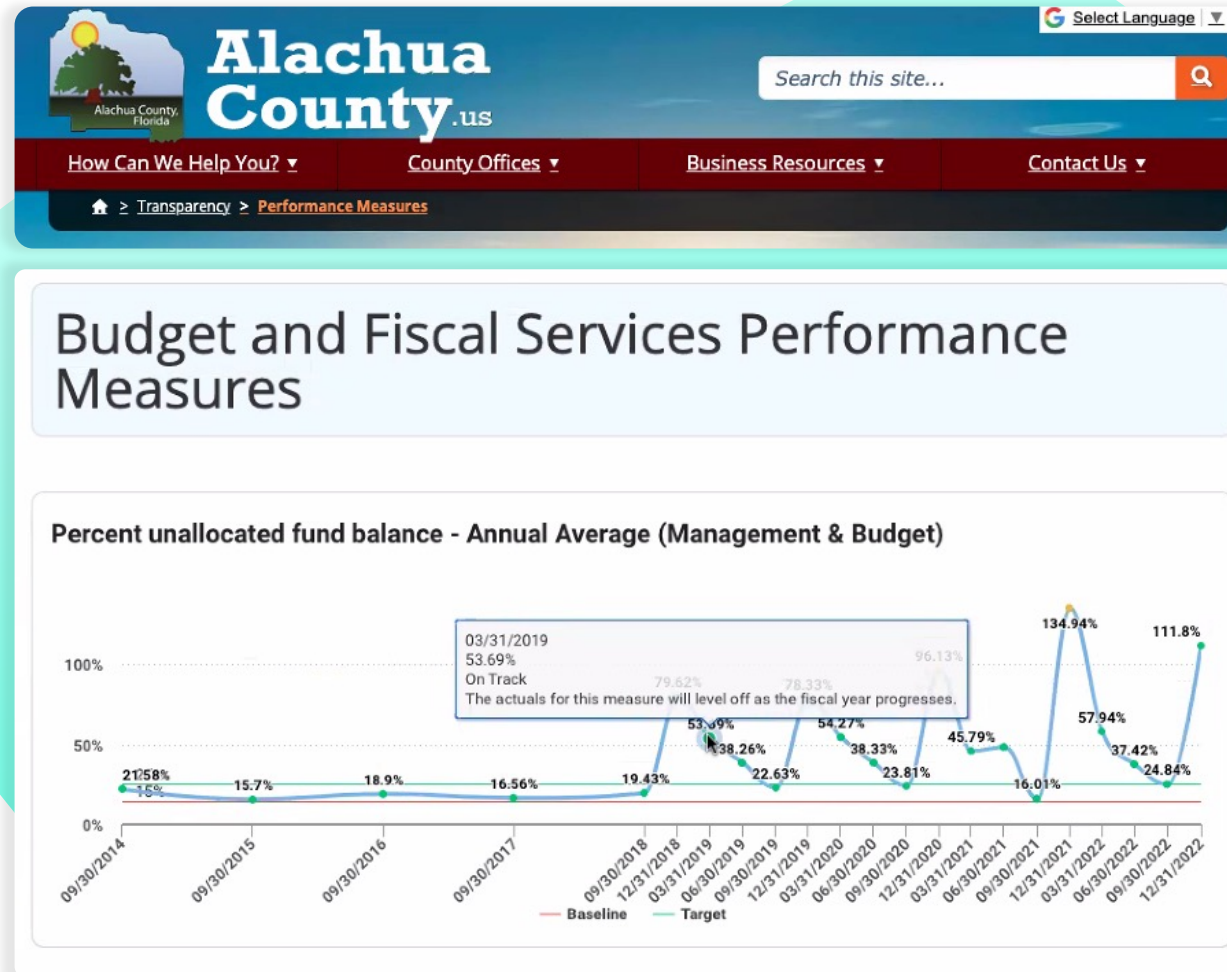


[Major customer executives.xlsx](#)

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



IT Schedule 70



National Association of
State Procurement Officials



National Cooperative Purchasing Alliance

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>

