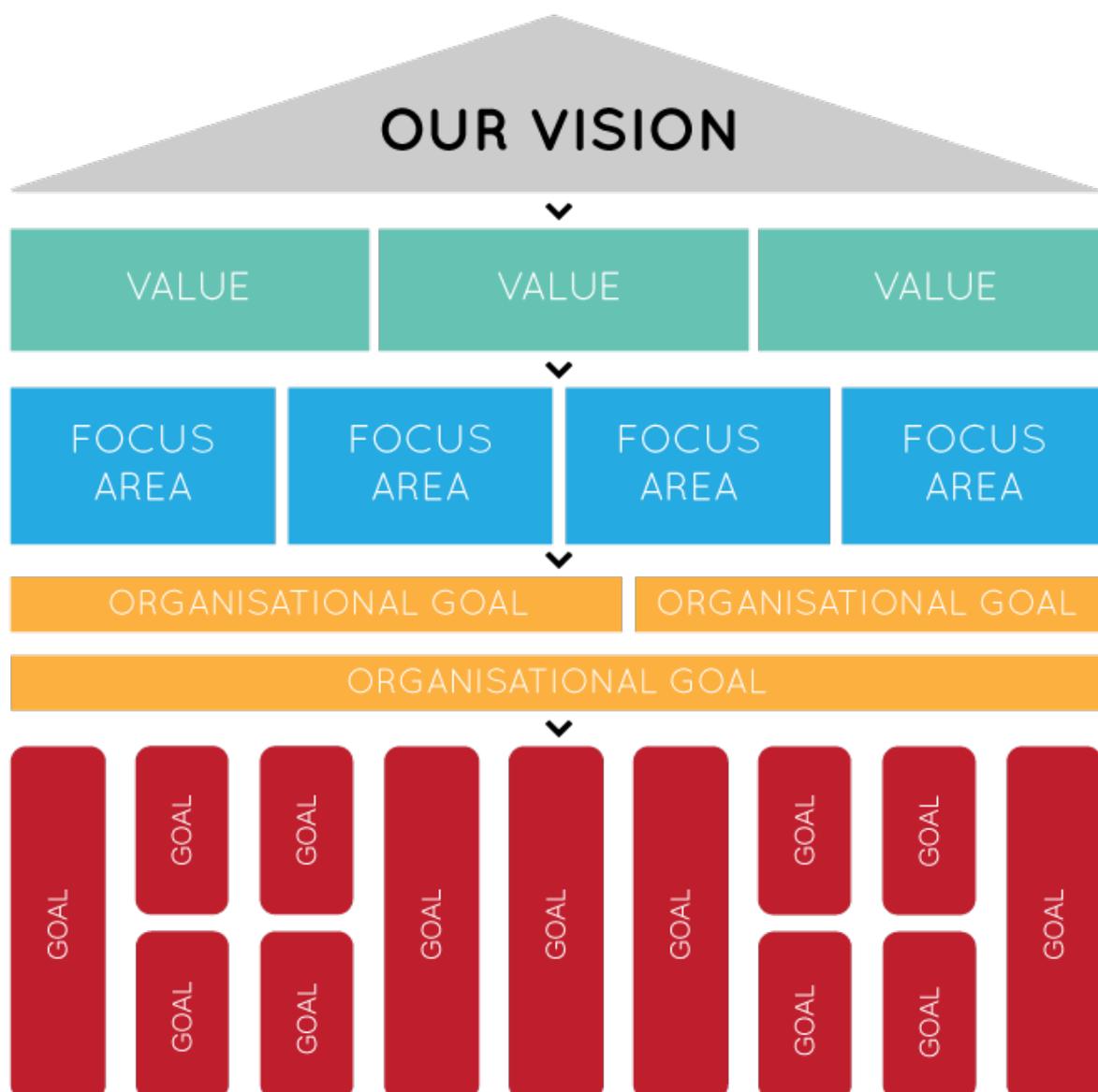


# STRATEGIC PLANNING 101

STRATEGIC PLANNING IS MUCH EASIER THAN MANY PEOPLE REALISE. ALL YOU NEED IS AN INTIMATE KNOWLEDGE OF YOUR BUSINESS AND SOME PASSION!

This guide can be used either standalone, or in conjunction with our cloud-based strategy platform Cascade. We'll be covering:

1. The Basic Foundations
2. Writing a Great Vision Statement
3. Creating Your Values
4. Devising Your Focus Areas
5. Writing Organisational Goals



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Let's start off by extracting the key principles of the framework that we use. This is not going to be a heavy guide on strategic planning, but rather an introduction to a methodology that we find works extremely well for small and large organisations. It is nothing revolutionary, and borrows heavily from various academic and real-life sources (too many to properly give credit too). However it's easy to use, and it works.

Think of your strategy as a flow chart that reads from top to bottom, with each step being mandatory before going down to the next. There is a reason that we called our product 'Cascade' - and that is that strategy needs to not only cascade down throughout your organisation, but it itself needs to cascade from a Vision Statement, to Focus Areas, to Goals, etc etc.

## Your Vision Statement (and/or Mission Statement)

First things first - a Vision Statement and a Mission Statement are not interchangeable or the same. However we found that in many cases, the amount of confusion generated from their relationship to one another means that it is actually more productive to focus on just one from a strategic planning angle. This is a good synopsis about the differences ([http://www.diffen.com/difference/Mission\\_Statement\\_vs\\_Vision\\_Statement](http://www.diffen.com/difference/Mission_Statement_vs_Vision_Statement)) - but for the purpose of this article, we'll just be talking about the Vision Statement.

Do not start your strategic plan without defining your Vision Statement!

*Why is it important?*

Tomes have been written about the value of a good Vision Statement - but I'll summarise as follows:

Your Vision Statement is the anchor that stops you getting lost at sea. It will help to tunnel your vision towards the outcomes that matter the most to your organisation. Every single thing that you write into your plan from this point onwards, will ultimately be helping you to get closer to your Vision. One of the biggest blockers to the successful execution of a strategic plan, is when it tries to achieve too much in one go. Creating a Vision Statement will help you to avoid that trap right from the off.

Not only that - but a truly well written Vision Statement will provide guidance and inspiration for your people. It might even help you to attract talent and investment into your organisation.

## Your Values

Unfortunately, the notion of 'corporate values' has been abused to the point of ridicule over the past century or so. ENRON's were 'Respect, Integrity, Communication & Excellence'...

Too often, organisations simply throw out words that they think will sound good in a glossy marketing brochure but have little relevance to anything else. Our take on 'Values' is subtly different and hopefully somewhat more pragmatic.

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Think of Values as the ‘enablers’ to your Vision Statement. Don’t be afraid to be honest about how you want your people to act and think. For example, a biotechnology company might have a Vision Statement such as:

“To change lives for the better, through the development and sale of affordable biotechnology products.”

They might then create a set of Values such as:

- **Innovative**
- **Responsive**
- **Caring**
- **Commercially Minded**

If you read the first three in a marketing brochure, you’d probably gloss over them as generic pretty quickly. But the fourth one; ‘Commercially Minded’ isn’t perhaps as typical to see. Let’s face it though, unless your people are commercially minded – you literally have zero chance of fulfilling your Vision – you’ll run out of cash way before you get anywhere near.

Don’t be afraid to create meaningful values as part of your strategic plan. You don’t have to necessarily publish these outside the organisation if you don’t want to – though you should never be ashamed to talk about the pragmatic needs of an organisation to succeed commercially.

*Why are they important?*

It can be extraordinarily easy to become over-focused on outcomes. Outcomes matter, for sure, but if the way in which you go about achieving them is wrong, the outcomes themselves risk becoming irrelevant. Not only that – but organisations are ultimately nothing more than the sum of the people within them.

The need for basic rules about how you want those people to work together is no different as to why the game of soccer needs rules. They exist to give a common purpose to your team (scoring goals), and to provide boundaries as to what people can do to achieve that purpose (no foul play).

## Your Focus Areas

Your Vision Statement gives you a degree of focus already – but will hopefully be suitably broad that it gives room for your people to come up with innovative ways in which to achieve it. Focus Areas help to provide that extra degree of clarification on your current thinking about the best way to get there.

Ideally, you will already have involved your people in helping to determine your Focus Areas! We recently wrote an article about the best way to engage your people with your strategy – and involving them in the creation of Focus Areas goes a long way to this end.

Focus Areas should be tighter in definition than your Vision Statement – but not to the

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level of having any particular metric or deadline. Following our biotechnology example above, some good Focus Areas might include:

- **Pushing the boundaries of technological innovation**
- **Exploring new markets to generate growth**
- **Gaining a deeper understanding of the needs of our customers**
- **Growing shareholder returns**

We usually suggest creating between 3 to 6 Focus Areas. Any fewer and they will probably be too vague. Any more, and well.....! for one certainly can't focus on more than 6 things concurrently!

*Why are they important?*

You absolutely want your people to feel empowered to come up with innovative and creative ways to be successful. But for the same reason that you're reading this guide right now - giving them a framework within which to do so, will be hugely helpful.

Well written Focus Areas can themselves be inspiring and motivational. Once again, they will help to unite your organisation behind a common purpose - and bring a sense of togetherness and belonging which should help to ease the tensions that can sometimes arise between teams and colleagues.

## Your Strategic Objectives

Your Strategic Objectives should align to one or more of your Focus Areas. It's here that for the first time in our journey so far, that we need to start being quite specific. How specific? Let's take a look at an example of a well written Strategic Objective:

*- Expand operations into Asia Pacific by the end of December 2017*

This is too specific to be a Focus Area. Whilst it's still very high level, it has a clear outcome and a deadline. Both these aspects are critical to a good Strategic Objective. Another common problem area for strategic plans, is that they never quite get down to the detail of what you're actually going to do.

It's way too easy to simply state 'we need to grow our business' - without concrete objectives, those plans will sit forever-more within their PowerPoint templates, never to see the light of day after their initial creation / review.

*Why are they important?*

To be honest - your Strategic Objectives are the heart and soul of your plan - without them, you have no plan!

More helpfully perhaps, the reason they're important as distinct to your Goals (see below) is that jumping straight into Goals is a sure-fire way to either (a) miss opportunities or (b) lose the connection between your Goals and your Vision Statement.

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## Your Goals

Goals are not strategic per-se. They are however absolutely critical, as without them your plan is nothing more than a statement of intent. When we look at our experiences of working with clients – the strategic plans which have failed are the ones where Goals were not clearly defined – or were defined so slowly that the momentum of the strategic planning process was lost.

A Goal should be even more specific and detailed than the Strategic Objective under which it sits. It needs (ideally) not only a deadline, but also a metric and a unit of measurement (such as a \$ value, or some other relevant KPI).

We did a review across a sample of completed Goals from the Cascade platform, and found that Goals that had a unit of measurement assigned to them (excluding ‘% complete’) were more than twice as likely to have been completed on time, than those which did not!

Goals are also your opportunity to assign accountability to the delivery of your plan. Again, a common cause of strategic failure is that no-one actually owns the things that need to be done. It’s for this reason that in Cascade, we actually force the user to assign an owner to each Goal before allowing them to officially ‘Launch’ their plan.

*Why are they important?*

This is so critical, that I’m going to repeat it again here. Accountability.

Goals have people’s actual names alongside them. Don’t underestimate the power of that association when it comes to actually getting your stuff done!

## Next Steps

This article really is only the start of our journey when it comes to exploring the components of a good strategic plan. We’ll be exploring the components of a good strategic plan in much more detail below.

# GREAT VISION STATEMENTS

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## Getting Started

Here's a quick reminder of what we're trying to achieve with our Vision Statement (not everything will apply to every organisation, but you'll get the gist...)

- Creating the pinnacle of the funnel, which every significant action we do going forward will ultimately be contributing towards.
- A memorable and inspirational summary that describes our reason for existence as an organisation – one that will help to motivate existing employees and even attract high quality new ones.
- A succinct statement about what our organisation is trying to achieve to help third parties such as investors or the media better understand us.
- A 'limiter' that helps us to rule out certain opportunities which do not ultimately contribute to our vision.

## What a Vision Statement SHOULD be:

There are a few common rules that pretty much all good Vision Statements should follow:

1. They should be **short** – two sentences at an absolute maximum. It's fine to expand on your vision statement with more detail, but you need a version that is punchy and easily memorable.
2. They need to be **specific to your business** and describe a unique outcome that only you can provide. Generic vision statements that could apply to any organisation won't cut it (see our examples below for more on this point).
3. Do **not** use words that are open to interpretation. E.g, saying you will 'maximise shareholder return' doesn't mean anything unless you specify what it looks like.
4. Keep it **simple** enough for people inside and outside your organisation to understand. No technical jargon, no metaphors and no business buzz-words if at all possible!
5. It should be **ambitious** enough to be exciting but not too ambitious that it seems unachievable. It's not really a matter of time-framing your vision, because that will vary by organisation, but certainly anything that has a timeframe outside of 3 to 10 years should be challenged as to whether it's appropriate.
6. It needs to **align to the Values** that you want your people to exhibit as they perform their work. We'll talk more about Values in a future article – but once you've created those Values later on, revisit your Vision to see how well they gel.

Following these rules should give you a pretty good starting point for creating your own vision statement. To help refine things further, we'll now look at some examples of vision statements that did *not* follow these rules...

## Some not-so-great Vision Statements (and why)

Here are some examples of real-life vision statements that in our opinion, could do with a little tweaking. For each one, we'll try to justify our thinking...

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“Our company vision is to make every brand more inspiring and the world more intelligent.”

Well, this one gets a tick on the ‘ambitious’ test if nothing else. But....is it realistic that ‘every brand’ will use the services of this company? How about ‘making the world more intelligent.’ – let’s try to quantify what that might actually look like. Or let’s not. Because it’s impossible.

Not to be too harsh though – there are strong elements here; ‘making brands more inspiring’ makes a lot of sense and has some depth.

“Provide maximum value for our shareholders whilst helping our customers to fulfil their dreams.”

This ‘vision’ could pretty much apply to any company, anywhere (it’s an insurance company in this case – but would you have guessed that?). It’s sort of like saying ‘Our Vision is to succeed as a business’. Not wrong – but certainly not inspiring or unique.

Last one...

“We are committed to achieving new standards of excellence by providing superior human capital management services and maximizing the potential of all stakeholders – clients, candidates and employees – through the delivery of the most reliable, responsive....[and it goes on, but that’s probably enough]...”

It would be quite hard to write a vision statement filled with less tangibility and more subjectivity than this one. ‘New standards of excellence’. ‘Superior human capital management’. ‘Maximising the potential’. There are simply far too many buzz words, intangibles and vaguery here for this to be either memorable or inspiring. It’s also simply far too long!

We are of course being rather harsh. But hopefully the above examples illustrate well some of the pitfalls to avoid when creating your own vision.

## The Process

There are literally hundreds of articles out there that will give you examples of good and bad vision statements as well as a high-level overview of what to consider when creating your own. But what we noticed was lacking was a concrete process to go through to help you create one. As such, we’ve outlined a process that we have used with clients in Cascade that might work for you too.

There are plenty of great vision statements out there that will not conform to the process

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below – but if you’re struggling or just need a place to start, then hopefully this will help.

### Step 1: Define what you do as an output

Start by being exceptionally clear about what it is your organisation actually does. Be careful to remain ‘output focused’ rather than ‘input focused’. For example, Apple famously had a vision statement to *Put an Apple computer on every desk in the world* (slightly paraphrased). Strictly speaking what Apple ‘do’ is make computers, but for the purposes of their Vision, they looked forward to the actual outcome of this process – i.e. computers on desks.

Let’s look at some other hypothetical examples:

A bakery makes bread. But the outcome is consumers enjoying that bread.

A consulting company gives advice. But the outcome is the success of others based on that advice.

A government department does...lots of things. But the outcome is better lives for the citizens they serve.

Whilst this process may seem obvious – you would be surprised by how rarely organisations actually go through this process in a formal, written way. Doing so will take you a long way towards creating your vision statement – BUT it’s not enough alone! If it was, all bakeries for example would have the same vision statement – which is hardly inspiring!

### Step 2: Define what unique twist your organisation brings to the above outcome

Very few products or services these days are truly new – most are more like reinventions of something that exists already, but with a different approach, focus or spin.

At some point in your organisation’s lifespan – someone will have believed that the reason that THIS organisation would be successful where others have failed, was because of..... something.

You need to define that something!

Let’s take our bakery example. So far, our vision statement is looking pretty generic, along the lines of customers enjoying our bread. But why will they enjoy our bread MORE than the bread from the place next door? Is it because we use centuries old traditions passed through generations of our family? Because we only use premium grade locally sourced ingredients? Whatever your unique selling point is – let it shine through in your vision statement.

### Step 3: Apply some high-level quantification

A common problem with vision statements is ironically, that they are too visionary! With

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no possible end in sight (or a totally unrealistic one) – the initial inspiration derived from a great vision statement can quickly turn to frustration, or even cynicism among employees and customers.

That said – don't be too specific or apply specific metrics at this stage (they will come later in our planning process).

Sticking with our bakery example – we might want to refine our target audience to 'every customer who walks through the door' – that's fine, or maybe we want to be bolder: 'every customer within walking distance of a store'.

The quantification we apply could also be industry specific if you're a B2B – are you shooting for SMEs or multinationals for example?

#### **Step 4: Add relatable, human, 'real world' aspects**

OK, your vision by this point should be getting pretty close to being finished. But one final trick you can apply to help make it even more memorable is to add a real-life aspect so that people can conjure up a solid mental image to associate with your vision statement. Let's look at an example – which of the following statements is likely to be more memorable:

a) To have every working person in the world using an Apple product.

or...

b) An Apple product on every desk.

I would argue that (b) is more memorable, because as I read this, I'm actually visualising an Mac (in my case) sitting on a wooden desk in a room. There's nothing wrong with (a) but it's highly conceptual and thus difficult to transform into a mental picture. Let's look at another example:

“Ensure that every customer who leaves our store, does so smiling.”

Here, using the word 'smiling' as opposed to 'happy' is powerful, because it conjures a mental image of a person smiling.

It won't always be possible to bring this level of tangibility to your vision statement – but if it is, I would strongly encourage doing so.

#### **Bringing it all together**

Let's finish off with a look at what a completed vision statement could look like for our bakery, based on the above:

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“Producing and selling locally sourced cakes and pies that are so delicious and satisfying, that every customer who leaves our store does so with a smile.”

If we de-construct this into our various steps, we can see each at work as follows:

“Producing and selling **locally sourced** cakes and pies that are so **delicious and satisfying**, that **every customer** who leaves our store does so **with a smile**.”

Step 1 - The output

Step 2 - The twist

Step 3 - The quantification

Step 4 - The human connection

Let me reiterate – there are other ways to construct great vision statements – but even if yours doesn’t look quite like this at the end of the day, simply following the process above will help you to bring structure and purpose to your effort.

We’d love to hear your own thoughts about the above process, and any examples of good (or bad) vision statements that really stuck with you!

In our next article, we’ll be looking at creating a great set of corporate values, how they link to your vision, and how they can support your strategic planning.

# CREATING YOUR VALUES

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In this article, we'll be examining how to create powerful, relevant Organisational Values, that will help to bring your Vision Statement and strategic plan to life – through your people.

Organisational Values are sometimes viewed as superfluous. In many cases, employees and customers alike dismiss them as mere marketing gimmicks. Our view is different – we see Values as a critical part of the strategic process – the reason being, that they go right to the heart of the most important ingredient of your strategy – your people.

## Internal vs External Values

This is the difference between creating Values intended for your own people, vs Values aimed at your customers or other stakeholders. We're going to go out-on-a-limb here and say that in our own experiences, internal Values are almost always more powerful for helping you to execute your plan, than external ones.

External Values are always more prone to being gimmicky and marketing oriented. Not that there cannot be cross-over, or indeed a single set of Values that apply to both – but for the purpose of this article, we're going to skew heavily towards internal Values and how best to devise them.

## Avoiding Fluffy, Vacuous Values

Perhaps the single biggest reason that Values are so often seen as gimmicky, is because they didn't emerge 'naturally'. In a perfect world, your Values should really write themselves, as they should reflect the qualities and traits of the people you have already hired. Whenever we make decisions about whether to hire or work with someone, we unconsciously assess their Values as part of that process.

Look at the people around you – those who the organisation's success truly relies upon – ask yourself what it was that made you hire them. With any luck, you'll be able to identify shared and consistent Values among those people. Shared Values help to create synergy – and a team of people working synergistically together will always be stronger than a group of disconnected individuals – no matter how smart they may individually be. It's not a matter of dismissing individuality, but rather one of recognising the power of a tight set of core behaviours that everyone shares, understands and embraces

If you go through this exercise and still find it hard to tease out common themes (perhaps you're still in the early hiring phase, or maybe you want to make broader changes) – don't worry, there's another way of looking at things that should get you to the same result.

Think about your next hire:

*What type of behaviours and mindset are you looking for?*

*What personality traits will help the new person to work well with the rest of the team?*

*What type of individual potential will be most useful for the greater good of the organisation?*

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## The Process in Action

To give a tangible example, we wanted to share with you our internal set of Values here at Cascade Strategy. In other articles in the series, we've used a hypothetical Bakery company for our examples – but Values are simply too personal to be anything other than the genuine article.

### Value 1: Learn everyday

*Why?*

We're a small but growing organisation. The strongest trait that our organisation needs to achieve success is self-motivated people. Arguably the two most important drivers of this are a) a passion for what you do and b) the ability to genuinely enjoy your work and embrace it as a positive aspect of your life. In the long term, the only thing that can consistently deliver both a) and b) are a process of continued challenge and learning. Why do we enjoy games (sports, video games, board games, you name it...)? – We enjoy them because they're challenging, and as we learn and improve, we apply that knowledge to move continuously forward – our reward is progress – and that progress gives a sense of pleasure. We applied exactly the same principle in devising our first Organisational Value.

*How do we bring it to life?*

We encourage and fully allow people to discover and work with the tools and technologies they want to learn. We empower them to implement the processes or techniques they wish to try, and research new ways of doing things. We allow them to change their minds and we never rebuke 'failure'.

### Value 2: Improve continuously

*Why?*

The market we are in with our strategy software Cascade, is a competitive one. Our strength will never be as a defensive entity who protects our intellectual property or throws large amounts of money on broad funnel-based marketing campaigns. Instead, we need to continuously improve and enhance our products and our service – moving them both forward quite literally on a daily basis. We need this same mentality in each and every one of our people.

*How do we bring it to life?*

We've installed a culture of self-reflection, and each associate is invited to reflect upon their own and each other's work constructively. There is always something we can improve, whether it's a concept or a product feature. No-one shies away from honesty, and the only way to take a bolder and sometimes disruptive position as a team, is to express ourselves by being ourselves. If someone has a view on how something can be done better – they are encouraged to express it at the earliest possible moment, without waiting to have devised a fully formed solution. This is in stark contrast to the culture in many large corporates, where inadvertently, people have come to the conclusion that they should only voice a concern, when they have a robust and fully developed alternative in mind. Individual egos are replaced by a collective effort.

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## Value 3: Stay connected

### *Why?*

This is our broadest Value and the one which we encourage each individual to interpret in a different and highly personal way. For some it's about being connected to our customers – for others, it's more societal or even environmental. All these stakeholders are important to the success of our business. By allowing people to interpret this Value in their own way, it engenders more passion when it comes to fighting for the best outcomes for any particular stakeholder. We need to fight fiercely for the needs and wants of each of our stakeholders and we've found no better way to do this, than by making things personal.

### *How do we bring it to life?*

We create synergies between functional teams as much as we can – even when those teams deal with ultimately very different stakeholders. There is no such thing as IT that only does IT, or marketing that only does marketing. Everyone talks to each other and presents their ideas and work. We ask everybody their own opinion about business strategies and decisions, and we forward sales or support emails to all associates – not just those responding on the front line. Transparency is great for motivation and giving a sense of the bigger picture.

### **A Summary of the key steps you need to take**

1. Analyse the behavioural traits of those around you and identify themes
2. Ask yourself what traits you will be looking for in your next hires
3. Understand your own strengths and weaknesses as an organisation – and try to create Values which will play to your strengths and mitigate your weaknesses
4. Bring these things together in a set of Values that are short both in number and in length (we suggest between 3 and 5 Values as a rule of thumb – each no more than just a few words)
5. Test these Values by asking whether or not they resonate with your people – they must!
6. Revisit your Vision Statement – are your Values consistent with your strategic Vision? Will they take you closer to making it a reality?
7. Don't stop there – write down on a piece of paper why each Value is important and tangibly what you will do to live it as an organisation

To conclude, organisational Values should be easy to write and should come out naturally. If you're finding the process hard, it probably means you need to spend a bit more time getting to know your people, or even yourself!

As always, let us know what you think about our process – do you agree with our key points? What Values have been most powerful and memorable from organisations you've worked with previously?

# FOCUSING YOUR STRATEGY

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## What is a Focus Area?

Focus Areas are the foundation stones of your strategy. They expand on your Vision Statement and start to create some structure around how to actually get your organisation to achieve its goals. In past articles, we've used the example of a local bakery to illustrate aspects of a solid strategic plan – we'll continue that theme here. To recap:

### **Our Vision:**

Producing and selling locally sourced cakes and pies that are so delicious and satisfying, that every customer who leaves our store does so with a smile.

### **Our Values:**

Learn Everyday, Improve Continuously, Stay Connected

### **Our Focus Areas:**

- 1) National Expansion
- 2) Repeat Business
- 3) Innovative Products
- 4) Proud & Happy Employees

A common question we receive from organisations using our cloud system Cascade is 'How many Focus Areas should we create'? The answer is in the question. How many things can you and your people realistically focus on at one time? In our experience, 3 to 6 is probably a reasonable range. Focus Areas should be easy enough to remember so that any employee you bump into in a corridor should be able to easily recap them. Any more than 6 Focus Areas runs the risk of you being, well....unfocused!

One of the hardest things about choosing Focus Areas for your organisation, is deciding what to leave out. You probably have a thousand things that you want to achieve, but one of the key outcomes of this process is to refine these things down to those that really matter in the here and now for your organisation. The rule is, if an activity does not fit into one of your Focus Areas – it shouldn't be happening – at least not right now. Sure there may be 'emergency exceptions' here and there – but it's important to commit to the process of refinement wholeheartedly, so spend enough time creating your Focus Areas to ensure they cover the gambit of everything you want to achieve.

## Some Rules of Thumb for Choosing Focus Areas

To help you create quality Focus Areas, we've devised the following checklist that by-and-large, all your Focus Areas should conform to:

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### 1) No longer than 5 words each

Long winded Focus Areas are an oxymoron – if you can't distil your focus into 5 words or less, keep refining it until you can – it needs to be simple and memorable.

### 2) Not too broad

Don't cheat by creating broad Focus Areas like 'Be profitable' unless this really is a specific focus (e.g. for new startups) – this defeats the point of the exercise and doesn't help you to focus at all!

### 3) No jargon

Avoid ambiguous terms like 'maximise' or 'succeed' – state what you are trying to achieve as an outcome, not how you are going to do it.

### 4) No metrics

Conversely, it might be tempting to add specific targets or metrics to your Focus Areas – avoid this. Metrics will absolutely come into play for your plan, but not at this stage. Keep things high level for now, but still outcome focused.

## How to Get Started

In truth, when we distil the various Focus Areas of clients we work with in Cascade, we can surmise that the vast majority fit into one of the following broad business objective categories. If you're struggling for inspiration, think about which of the following categories you want your organisation to focus on and build out some Focus Areas from there:

- Expansion / Growth – e.g. Expand network to Asia Pacific
- Revenue / Cost / Margin – e.g. Increase sales
- Customer Satisfaction – e.g. Repeat business from customers
- Compliance – e.g. Zero regulatory issues
- Innovation – e.g. Launch new product lines
- Engagement with a Stakeholder Group – e.g. Engage with our community
- Employee Happiness – e.g. Proud & Happy Staff

You may well create Focus Areas that don't fit into any of the categories above, but hopefully this list gives you a good starting point. The methodology is not dissimilar from ones such as the Balanced Scorecard and most other strategic frameworks for that matter.

## Linking Focus Areas to your Vision Statement & Values

The key outcome that we're trying to achieve with our Focus Areas, is to realise our Vision Statement. Ask yourself, if you succeed on each of your Focus Areas, will you realise your Vision in full?

If your gut tells you 'no' – then you've got a couple of options. Either revisit your Focus Areas or revisit your Vision Statement. Either approach is valid – one of the key rules around creating our Vision Statement was to incorporate an element of pragmatism (not too much though!). If your Focus Areas encompass the entirety of what you think your organisation can realistically achieve (even with any growth that forms part of your plan), and they still won't realise your Vision – don't be afraid to go back a couple of steps and make some tweaks.

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When it comes to aligning our Focus Areas to our Values, this is equally important albeit for a different reason. Well written Values should encompass our desired organisational culture. Our culture is the environment, or if you prefer the enabler for our activities. There are no hard and fast rules about how Values and Focus Areas should fit together – but a couple of obvious examples might be:

*(Value) Energy – [Focus Area] Expand our business internationally*

*(Value) Empathy – [Focus Area] Responding to Customer Feedback*

*(Value) Continuous Learning – [Focus Area] Staff Training & Empowerment*

In much the same way as for your Vision and Values – we would strongly encourage you to involve your key team members in the process of creating your Focus Areas. As always, the more involved people are in the creation process, the more empowered they will be to deliver them. There are many ways to do this, from running Focus Groups, issuing Surveys and simply being responsive to ideas and suggestions as they come up as part of business-as usual. Some cloud platforms including our own Cascade incorporate tools to help you do just this – but nothing beats a culture of open and honest communication where such discussions occur naturally as a result of people's pride and passion for the organisation.

As always, we'd love to hear your thoughts, ideas and additions on this article. What else should a good Focus Area contain? Reach out to us via social media or email.

# GREAT STRATEGIC OBJECTIVES

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Strategic Objectives are probably the most fun and exciting component in your entire strategic plan. This is where you finally breathe life into your dreams and visions and translate them into concrete steps and actions.

## What is a Strategic Objective / Organisational Goal?

Note: In our Cascade platform, we call Strategic Objectives 'Organisational Goals' – they are one and the same for the purpose of this article.

Let's start by defining what it is we're talking about here. A Strategic Objective is a specific goal that you want to achieve, with a clearly stated outcome and a deadline. It differs from a Focus Area – in that it is specific and measurable, and once completed will be replaced by another, different goal. In other words, it is something that can be tangibly achieved.

It is also one of the primary 'goals' of the organisation, underneath which many sub-goals will eventually align.

The way I like to think of a Strategic Objective is:

*If I was meeting with my investors or board – what would be the key programmes & objectives that I would update them on, if I only had an hour.*

This is a useful way to ensure that your Strategic Objectives are neither too high level to be relevant, nor too detailed to be overly operational.

## How Many Strategic Objectives Should I Have?

There is of course no right answer here – though there are certainly risks if you get the number wrong. Too few and you're probably not stretching yourself. Too many and you're unlikely to achieve them all, which should absolutely be your intent.

As a rule of thumb – if we tie Strategic Objectives into our bigger framework – we would probably suggest having between 2 and 4 Strategic Objectives, per each of your Focus Areas.

## How Should I Structure a Strategic Objective?

The main advice here is to keep things simple. Strategic Objectives should be easy to remember and should be understandable by everyone within the organisation. That means no jargon (if possible), and keeping them to one sentence long. You can add more

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detail of course, but you should be able to sum up what you want to achieve quickly and simply.

We suggest a structure as follows:

**Action + Detail + Metric + Unit + Deadline**

In other words:

**Expand our international operations into 3 new markets by 21st December 2016**

Starting off with a verb forces you to be specific about what you're trying to do. If you possibly can include a metric and a unit – do so. It will help to keep you focused and honest when it comes to tracking your progress. Having a deadline works in much the same way.

A nice thing about using this structure combined with a cloud based strategy platform is that you can do some pretty cool reporting on your goals – such as having the system analyse your 'Action' words to give you a flavour of how you're approaching your strategy (Aggressively? Defensively? Etc.)

### How do I Ensure Accountability?

Depending on the size of your organisation, you may want to delegate some degree of accountability for individual Strategic Objectives to your management team. Ultimately, as the leader of your organisation's strategy – you still need to be accountable for all of the objectives – but that doesn't mean that you can't share that ownership with someone else.

For Strategic Objectives, we would strongly recommend having a maximum of two co-owners for each, including yourself. Why? Because any more than that, and you risk falling into a situation where people become overly reliant on 'someone else' to own the goal. You can absolutely involve far more people in delivery – through a series of linked (or cascaded) sub goals. But you want at most two people being responsible for the ultimate delivery of the Strategic Objective.

### Some Final Suggestions and Thoughts

Following the above outline should help get you off to a good start in creating your own Strategic Objectives. Here are just a few more collected thoughts that might help too:

- Don't be afraid to iterate. You probably won't get things right first time, but sometimes you need to get your Strategic Objectives out on paper to appreciate where the gaps are.
- Involve the people of your organisation as early as possible. Don't sit in a room and try to do things yourself. Define your Vision, Values and Focus Areas – and use that to help structure a broader engagement with your team about what your Strategic Objectives should be.

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- Consider publishing your Strategic Objectives on your website. Sometimes, for reasons of confidentiality this won't be possible – but for some organisations (such as public sector or not-for-profits) this is a great way to communicate transparently with your stakeholders. Here's an example of how we do this in Cascade using our API: <http://www.itismycity.me>

We'd love to hear your additions to this list either by email, or via our social media channels!

That concludes our Strategic Planning Guide. If you're using the guide alongside your Cascade subscription, don't hesitate to reach out to our team of strategy experts to help get your own plan up to speed.

**Don't forget, if you'd like to try the complete Cascade Strategy solution absolutely free of charge, visit our website at <https://www.executestrategy.net> and start your free trial today.**