



Post Office Box 394
Georges Mills, NH 03751-0394
Tel 774.840.0035
www.iteamne.com

Strategy Assessment on the Run

Five Easy Steps to Test Your Assumptions...a pocket guide for the busy not-for-profit manager

By: Mario Capozzoli, i team new England consulting, LLC

New and innovative ideas come in all shapes and sizes, with different projected outcomes and impacts. This is something that I believe we can all agree on. But do we always (or even frequently) thoroughly question or think about our initial assumptions before we push the “Go” button?

With many folks working on the fly, under pressure to deliver in a timely and successful fashion, it becomes more important that we stop, take a breath, and put our new ideas, strategies, techniques, and approaches through their paces.

I created this list of five critical questions to do just that: to quickly and decisively review my strategy assumptions, making necessary changes as I discover them, before I dive in, potentially risking precious resources and even more precious time.

1. What do we assume will occur to make this strategy successful? Must there be a shift in thinking or behavior? A transformation on some level? Do we visualize a story unfolding in our heads? It stands to reason that if this strategy is new or different in some way, then it must include an expectation of change. Ergo, what must change? Additionally, if we're to sell our strategy to someone else then we must be good at telling a compelling and convincing story about this expected transformation.
2. Do we have the capacity—on every necessary level—to carry out our planned strategy? For the most part, managers have traditionally viewed “resources” as people, money, and functions (such as machines). But now more than ever, especially in our philanthropic world, relationships and knowledge are seen as vitally important organizational resources.

Great ideas don't stand alone at the mountain top; capacity got them there! The equation is straight forward: limited capacity = limited success. Therefore, if you find yourself or your

intelligent & innovative consulting for New England's philanthropic community

department in a situation where you have limited or diminished capacity, then you must modify your plans to be successful. Better to catch this before you launch your strategy than in the middle of your launch cycle. (A big one: Do we have enough volunteers or the right type of volunteers to make this strategy successful?)

3. What structures are required—existing, modified, or new—to achieve success? I always tell my clients that structure is everything in the world of progress. No structure, no progress. When you bring together ideas, knowledge, people, and financial resources (known collectively as “capacity”), you must have a structure for the recipe to work.
4. How does this strategy move our organizational “vantage point”? Where do we see our competitive stance or position moving in our market? Is this best use/best value for what we expect to achieve?

Some folks call this process “building brand equity”. I call it logical thinking about where we want to go, in light of where we’ve been.

It’s no longer enough to see ourselves and our competitive position through our own lenses. We should engage others (perhaps external stakeholders) in the assessment process. After all, market indicators during these stressful times may not be exactly as they were in years past.

It is important to expand our view of our success indicators so that we do not trick ourselves or talk ourselves into believing that last year’s successes automatically translate into next year’s wins! Rather, we ought to dig deep, and perhaps innovate more, so that we may position ourselves for long-term growth in light of our rapidly-changing landscape.

5. Do we have the requisite management and personnel on board? Do we have the right volunteers? Are we aligned with the right community partners? Do we have credible and sufficient board involvement?

Many, if not most, of our challenges are not related to our ideas, our intentions, or our plans. Rather, many of the hurdles we face are directly related to our team members—those colleagues who simply cannot get the job done no matter what.

Go ahead and make those changes. Be innovative. Think of new and better mousetraps. But do it in full sunshine. The more honest you are with yourself and your colleagues up front, the better outcomes you will eventually realize, if you put your findings to good use and adapt your approach along the way.

Standing still is not a competitive position!