

TOOL #14: The Rolling 3-Year Strategic Plan Placemat

Roll-up your sleeves and gather the strategically-gifted board and senior staff around the table—and begin with this: “What is our strategy?”



Lessons From Bounty Paper Towels!

“Sameness Isn’t Strategy. It’s a Recipe for Mediocrity.”

Study *Playing to Win: How Strategy Really Works*, by A.G. Lafley and Roger L. Martin, with your team and you’ll appreciate the practical approach to creating a winning strategy. You’ll learn what strategy is, and what strategy is all about (choice). And you’ll also learn why P&G discerned that one paper towel product was inadequate for their numerous customer segments.

And this reminder also from Bob Hisrich and John Pearson:

**“Give people the choice to say ‘no’ to a few options—
yet still say ‘yes.’”¹**

Read pages 4 and 5 of *Playing to Win*—and you’re hooked (and convicted)! The authors list five ineffective ways that many leaders use when defining and addressing the strategy process:

- ✓ 1) “They define strategy as vision.
- ✓ 2) They define strategy as a plan.
- ✓ 3) They deny that long-term (or even medium-term) strategy is possible.
- ✓ 4) They define strategy as the optimization of the status quo.
- ✓ 5) They define strategy as following best practices.”

Lafley and Martin add, “Every industry has tools and practices that become widespread and generic. Some organizations define strategy as benchmarking against competition and then doing the same set of activities but more effectively. **Sameness isn’t strategy. It is a recipe for mediocrity.**”²

¹ John W. Pearson and Robert D. Hisrich, Ph.D., *Marketing Your Ministry: Ten Critical Principles* (Brentwood, TN: Wolgemuth & Hyatt, 1990), 98.

² A.G. Lafley and Roger L. Martin, *Playing to Win: How Strategy Really Works* (Boston: Harvard Business Review Press, 2013), 4–5, 36.

The Rolling 3-Year Strategic Plan Placemat (1-Page Tool)

TOOL #14 INCLUDES:

- ❑ 1. **THE STRATEGIC PLAN PLACEMAT IS THE FINAL STEP, NOT THE FIRST STEP**
The Rolling 3-Year Strategic Plan Placemat (1-Page Tool)
- ❑ 2. **POP QUIZ! BOARD AND STAFF READINESS ASSESSMENT**
The 7 Reasons Why Strategic Plans Fail
- ❑ 3. **ONE PLANNING APPROACH**
A Strategic Plan Task Force (Small Teams with Big Tasks!)
- ❑ 4. **RECOMMENDED FAITH-BASED RESOURCE**
Breakthrough: Unleashing the Power of a Proven Plan
- ❑ 5. **THE G.N.O.M.E. CHART**
Delineating the Board's Role and the Staff's Role
- ❑ 6. **MORE RESOURCES ON STRATEGIC PLANNING**
Be Strategic About Strategic Planning

Attn: Church Boards

While this template (and the example) is for a nonprofit ministry, your church's Strategic Planning Task Force can easily adapt it for use in your church. We recommend that both board and team members become familiar with a wide variety of secular resources and planning methodologies (see several mentioned in this chapter), plus these Christ-centered resources:

- ☑ *Breakthrough: Unleashing the Power of a Proven Plan*, by Randon A. Samelson (Colorado Springs, CO: Counsel & Capital, 2014)
- ☑ *Lessons From the Church Boardroom: 40 Insights for Exceptional Governance*, by Dan Busby and John Pearson (ECFAPress, Winchester, VA: 2019). See especially Lesson 38, "Leverage the 80/20 Rule in the Boardroom," and Lesson 39, "Don't Stretch Credulity with BHAGs and Stretch Goals."
- ☑ *Pursuing God's Will Together: A Discernment Practice for Leadership Groups*, by Ruth Haley Barton (Downers Grove, IL: InterVarsity Press, 2012)



❑ 1. The Strategic Plan Placemat Is the Final Step, Not the First Step

Numerous organizations have used this tool over the years—the Strategic Plan Placemat (11” x 17” in color) because it is an excellent one-page summary of their plans for the next three years. It’s “rolling,” because it rolls over every year—as one more year is added. So you’re always looking ahead three years.

But . . . before you rush to print . . . STOP!



The Strategic Plan Placemat is the *final* step,
not the *first* step,
in your strategic planning process.

Don’t skip the hard and important work
just to meet a board meeting deadline!

When you download the 11” x 17” Word document template for “The Rolling 3-Year Strategic Plan Placemat,” be sure to note one approach (there are dozens) for your strategic planning process. On the following pages, you’ll find helpful resources, an example of the placemat, and several excellent books.

Obviously, this one-page summary document—ultimately—is the culmination of very hard, disciplined work with both the staff and the board. **It’s the end result, not the beginning.**

On the following pages, you’ll see the process John often uses with clients. The CEO appoints a “Champion” for each segment (based on the champion’s “3 Powerful S’s: Spiritual Gifts, Strengths, and Social Style”). Then the champion works with a small team or task force of three to five others. Assignments and worksheets are provided for each team—and the champions meet once a month, or so, in person or via video conference to update each other.

These are tools that have worked for John and other facilitators—based on how God has wired them. Others have different and effective ways of discerning God’s direction for the future. But note Ruth Haley Barton’s reminder “**Just because something is strategic does not necessarily mean it is God’s will for us right now.**”³

***“Your strategic planning consultant/facilitator/volunteer
will use different tools to get you
to the top of Mount Everest (a completed plan).
But it’s important to let your facilitator
use his or her own tools!”⁴***

David Schmidt

³ Ruth Haley Barton, *Pursuing God’s Will Together: A Discernment Practice for Leadership Groups* (Downers Grove, IL: InterVarsity Press, 2012), 99.

⁴ Thanks to friend and colleague, David Schmidt of Wise Planning, for introducing us to the strategic plan placemat concept years ago. He knows how to get clients to the top of Mt. Everest! Visit: <https://wiseplanning.net>.

The Rolling 3-Year Strategic Plan Placemat (1-Page Tool)

See sample 11" x 17" (landscape format) strategic plan placemat example on next page →

Download the template for “The Rolling 3-Year Strategic Plan Placemat.” We recommend:

- ☐ 11" x 17" landscape on high quality paper
- ☐ Full-color placemat provided to every board member and staff member
- ☐ Enlarged version displayed in boardroom and lunchroom
- ☐ Select a Bible verse that summarizes your aspirations.

XYZ International’s Strategic Plan: 2020 – 2022

“Commit your actions to the Lord, and your plans will success.” (Proverbs 16:3 NLT)

(Logo here)	(Slogan here)
MISSION Why we exist.	Our mission is to...
VALUES How we will treat each other and our constituents.	We value: <ul style="list-style-type: none"> • _____ • _____ • _____
VISION What we want to be in the future.	Our vision is to...
BHAG Not achievable without God’s unique blessing.	By _____, 2022, our Big HOLY Audacious Goal is to... Note: The BHAG should be written as a “SMART Goal” and be measurable, memorable, and succinct. (For balance, read <i>The Choice: The Christ-Centered Pursuit of Kingdom Outcomes</i> , ⁵ and Lesson 37 in <i>Lessons From the Nonprofit Boardroom</i> , “Don’t Stretch Credulity With BHAGs and Stretch Goals.” The actual achievement of audacious goals is very uncommon.” ⁶

Visionary Priorities (S.M.A.R.T. Goals)	Year 1: 2020	Year 2: 2021	Year 3: 2022	Add 2023 by 11/15/2020
#1: (verb)...	• _____	• _____	• _____	
TO BUILD a...	• _____	• _____	• _____	
#2: (verb)...	• _____	• _____	• _____	
TO CREATE a...	• _____	• _____	• _____	
#3: (verb)...	• _____	• _____	• _____	
TO ENRICH a...	• _____	• _____	• _____	

Version 1.0 (Nov. 15, 2019). This Rolling 3-Year Strategic Plan Placemat is updated annually by November 15 and is ready for board approval at the year-end board meeting. **S.M.A.R.T. Goals** are: **S**pecific, **M**easurable, **A**chievable, **R**ealistic, and **T**ime-related.

⁵ Gary G. Hoag, R. Scott Rodin, and Wesley K. Willmer, *The Choice: The Christ-Centered Pursuit of Kingdom Outcomes* (Winchester, VA: ECFAPress, 2014).

⁶ Dan Busby and John Pearson, *Lessons From the Nonprofit Boardroom*, 2d ed. (Winchester, VA: ECFAPress, 2018), 194–97.

AMBASSADORS **FOOTBALL** ♦ **FAITH** ♦ **FUTURE** **F O O T B A L L**

The Rolling 3-Year Strategic Plan - 2020 to 2022

MISSION	OUR MISSION IS TO COMMUNICATE THE GOOD NEWS OF JESUS TO ALL PEOPLE THROUGH FOOTBALL.
VISION	OUR VISION IS THE TRANSFORMATION OF INDIVIDUALS AND COMMUNITIES THROUGH INDIGENOUS FOOTBALL OUTREACH.
VALUES	1) We value FOOTBALL : We participate in football at all levels with passion, excellence and respect. 2) We value CHURCH : We uphold the long-term, transformative role of the Church in the world. 3) We value TEAM : We identify and collaborate with others in the pursuit of shared goals. 4) We value SERVICE : We follow the example of Jesus by leading through service and prioritising the marginalised.
BHAG	Our Big Holy Audacious Goal: By December 31, 20__, to...

	2020	2021	2022	2023 to be added by Nov. 15, 2020
VISIONARY PRIORITIES →	BUILD (START WITH A VERB...)	CREATE (START WITH A VERB...)	SUSTAIN (START WITH A VERB...)	
GOAL #1	#1. Enrich : By Dec. 31, 2020, enrich ____ so that there are more than ____ (units) serving at least ____. #2. Grow : By Dec. 31, 2020, grow ____ so that there are more than ____ (units) serving at least ____. • Example: _____ • Example: _____ • Example: _____	#1. Enrich : By Dec. 31, 2021, enrich ____ so that there are more than ____ (units) serving at least ____. #2. Grow : By Dec. 31, 2021, grow ____ so that there are more than ____ (units) serving at least ____. • Example: _____ • Example: _____ • Example: _____	#1. Enrich : By Dec. 31, 2022, enrich ____ so that there are more than ____ (units) serving at least ____. #2. Grow : By Dec. 31, 2022, grow ____ so that there are more than ____ (units) serving at least ____. • Example: _____ • Example: _____ • Example: _____	
GOAL #2	#3. Research : By June 30, 2020, research ____ to discern if we should launch XYZ Program in 2021. • Example: _____ • Example: _____ • Example: _____	#3. Research : By Dec. 31, 2021, research the effectiveness of ABC Program to discern if we should stop, continue or grow in 2021-22 • Example: _____ • Example: _____ • Example: _____	#3. Research : By April 30, 2022, retain outside counsel to conduct a "top-to-bottom" program audit of all programs, products and services to be presented to ____ no later than Dec. 31, 2022. • Example: _____ • Example: _____ • Example: _____	
GOAL #3				

S.M.A.R.T. GOALS ARE: Specific, Measurable, Achievable, Realistic, Time-related
 ► This Rolling 3-Year Strategic Plan is updated annually by Nov. 15 and ready for board approval by Dec. 15 of each year. ◀ "Commit your actions to the Lord, and your plans will succeed." (Proverb 16:3 NLT)

Used by permission.

Ambassadors Football ► The Rolling 3-Year Strategic Plan ► Strategic Plan Placemat

Strategic Plan Placemat: 11" x 17" (landscape format)

EXAMPLE ONLY: The template on the previous page is just that—a template. Use the categories, if helpful, or create your own categories. If possible, begin each goal with a VERB (enrich, grow, research, engage, retain, abandon, pray, train, build, etc.). The final approved version will be the one-page summary of other documents, often including a supplementary document with 3-5 “S.M.A.R.T. Goals” for every team member. And...you’re NOT done until you have created monthly “dashboard” reporting templates (See Tool #11.)

Ambassadors Football (Example Only: Used by permission.)

	Year 1: 2020
Visionary Priorities →	BUILD A GLOBAL EVANGELISM MOVEMENT BY INSPIRING AND EQUIPPING 35 COUNTRIES WITH AMBASSADORS FOOTBALL EXPERTISE AND RESOURCES BY DEC. 31, 2022.
GOAL #1	#1. Enrich Current Country Relationships: By Dec. 31, 2020, enrich the international work and scope of AF so that all 25 country leaders (and their indigenous boards) rate AF support and services at 4.0 on a scale of 1 to 5 (5.0 is excellent).
GOAL #2	#2. Grow by 3 Countries: By Dec. 31, 2020, welcome at least 3 new country relationships (for a total of 28 total countries)—and affirm that the new countries have met the criteria per the “XYZ Relationship” document, to include: <ul style="list-style-type: none"> • Indigenous board of at least ____ people. • Three-year sustainability plan • Partner Relationship with a current AF country
GOAL #3	#3. Research & Teach Best Practices: By June 30, 2020, research the best practices of AF’s strongest countries and document 3 to 5 country models for effective ministry and create a 2021-2022 strategy for training these models/best practices to the other current and new countries. <ul style="list-style-type: none"> • Example: Case Study or Online Course or Webinars • Example: Consultant Team (of current country directors) • Example: Regional “McDonald’s University” model • And...identify 2-4 other international ministry organizations that have moved from 25 to 50 countries (and how they did it).

Read more about Ambassadors Football, a unique international organization ministering through football (soccer) around the world. www.ambassadorsfootball.org

❑ 2. POP QUIZ! Board and Staff Readiness Assessment The 7 Reasons Why Strategic Plans Fail

Don't assume that your organization is ready for a strategic planning process. Susan A. Waechter warns CEOs that "strategic planning often requires the board and staff to tolerate a level of vulnerability as they go through the process." She adds, "Participants should trust each other before beginning the process because negative feedback and criticism are common."⁷

Caution! The sum total of your board's and staff's prior strategic planning experiences whether in your organization or elsewhere (if negative)—may do serious damage to any future planning effort. Don't neglect what Waechter labels the "Planning to Plan" phase to assess readiness.

As part of the "Planning to Plan" introduction, perhaps at a joint board and senior team one-day offsite retreat, use this 15-minute pop quiz exercise on the next page.

POP QUIZ Steps:

- ❑ **Step 1:** Download and distribute the "Pop Quiz" page to each participant.
- ❑ **Step 2:** Invite a participant to read "Reason #1" out loud and—in teams of two—ask participants to indicate the "problem level" of this statement (1, 2, 3, 4, or 5).
- ❑ **Step 3:** Ask another participant to read "Reason #2" out loud—and repeat this process for all seven reasons (actually eight!) on why strategic plans fail.
- ❑ **Step 4 Summary:** Distribute red and green straw vote cards to each participant—and reading the statements out loud again—ask each team member to vote YES or NO on each statement, asking "Is this a major issue we will need to address before jumping in?" This will enable you to check the temperature of your organization's readiness to launch a strategic planning process.

Facilitator Suggestion: Be prepared to add your own color commentary for each of the seven reasons—after the team votes with their red and green cards. For example, you might reference this poignant wisdom from Fred Smith when discussing the importance of a written plan (noted in Bonus Reason #8):

*"I learned to write,
to burn the fuzz off my thinking."*⁸

Fred Smith

⁷ Susan A. Waechter, *Driving Strategic Planning: A Nonprofit Executive's Guide*, 2d ed. (Washington, DC: BoardSource, 2010), 12.

⁸ Fred Smith, *Breakfast With Fred* (Ventura, CA: Regal, 2007), 138.

POP QUIZ! The 7 Reasons Why Strategic Plans Fail

- 1 – Not our problem
- 2 – Might be our problem
- 3 – This is a minor problem
- 4 – Yikes! This is a major problem but fixable
- 5 – We need a written plan to address this



No.	The 7 Reasons Why Strategic Plans Fail	Insert Problem Level
1	EVENT THINKING: Strategic planning is viewed as an event or a task, instead of a transformational ongoing year-round process.	
2	TOP-DOWN EGO: Strategic planning is created top-down and characterized by ego and arrogance, instead of humility and listening.	
3	INTERRUPTION: Strategic planning is seen as an “add-on” interruption to my “real work,” instead of becoming absolutely core to my role.	
4	EXTRA EXPENSE: Strategic planning is viewed as an extra expense—with no budget line item—instead of an annual critical investment.	
5	BINDER SYNDROME: Strategic planning conjures up complex and time-consuming exercises and 3-ring binders, instead of being the servant to a simple and elegant plan that is grounded in the alignment between the mission, vision, values, BHAG, and S.M.A.R.T. goals.	
6	SACRED COWS: Strategic planning “economizes” by involving fewer and “safer” stakeholders who honor tradition, dead horses and sacred cows, versus out-of-the-box dangerous ideas!	
7	PSEUDO PRAYER: Strategic planning gives a wink and a prayer to holy input, versus an extraordinary process of assembling spiritually discerning people together to hear from God—who then joyfully follow His plan.	
Bonus Reason!		
8	VERBAL FUZZ: Strategic planning festers in a “verbal draft” purgatory, rather than becoming a disciplined process that is both written and actually implemented!	
Other Reasons		
9		
10		

❑ 3. One Planning Approach A Strategic Plan Task Force (Small Teams with Big Tasks!)

Here is one planning model to consider. Use this 3-ring binder table of contents to create “**The Rolling 3-Year Strategic Plan Process and Schedule.**” This worksheet lists the chronological steps a task force might follow when creating the strategic plan. Small teams will address niche assignments and then share critical information and findings with the task force, culminating in the one-page Strategic Plan Placemat. See the following pages for the commentary on the small teams and their big tasks!

ABC Organization’s Rolling 3-Year Strategic Plan Process and Schedule⁹

GOAL: Final Draft (Version 4.0) to Board: Sept. 15, 2020 Deadline

Updated by: Emelia Anderson on March 1, 2020

3-RING BINDER TABLE OF CONTENTS (15 tabs)

TAB	Strategic Plan Tasks & Teams (generally completed in this chronological order)	Champion* *Appointed on 12/15/19	1st Draft Deadline
12	Planning to Plan: Readiness Assessment The 7 Reasons Why Strategic Plans Fail	Facilitator	
12	The 5 Most Important Questions You Will Ever Ask About Your Organization (Jan. 8 session)	Facilitator	
4	Mission, Vision, Values, BHAG		
5	Our Customers and What They Value		
6A	Environmental Scan		
6B	S.W.O.T. Analysis		
6C	Trends (and Trend-Spotting Exercise)		
6D	Assumptions (“The Radar Report”)		
7	Spiritual Discernment Process (ongoing: beginning to end)		
8	Three-Year Visionary Priorities (by department)		
9	Top-5 Goals for Year One		
10	Board & Senior Team S.M.A.R.T. Goals and Monthly Dashboard Reports		
11	Communicating Our Results (4 Creative Options)		
12	Appendix		
1	Introduction		
2	Organization-at-a-Glance & Historical Snapshot		
3A	Executive Summary		
3B	The Rolling 3-Year Strategic Plan Placemat		
SUPPLEMENTARY RESOURCES:			
13	Customized Strategic Plan Versions (Board, Staff, Volunteers, Donors, etc.)		
14	HOOPLA! Celebration		
15	Update of Annual Planning Calendar		

⁹ Adapted from John Pearson’s three-day workshop, “The Rolling 3-Year Strategic Plan Workshop: Build It. Execute It. Update It. Year After Year!” <http://managementbuckets.com/workshops>.

5 Elements

<input type="checkbox"/> 1. The Process	Select a facilitator/consultant that has a track record for scaling Mt. Everest—and empower that person to select the methodology that has worked well for him or her in the past.
<input type="checkbox"/> 2. The People	Board/staff task force? Staff-only task force with regular updates to the board? Either way, leverage their CliftonStrengths.®
<input type="checkbox"/> 3. The Placemat	Wordsmith the one-page placemat with prayerful discernment and an eye to communicating the plan to multiple customers (board, staff, donors, clients, volunteers, etc.).
<input type="checkbox"/> 4. The Proclamation	Get the plan off the shelf and into the streets! Completing the plan is just the start. Now you must sell the plan.
<input type="checkbox"/> 5. The Progress	Monitor Results: Dashboards. Targets. Measurements. Metrics. Monthly Updates. <i>Make strategic planning an on-going, year-round process—not a one-time event.</i>

7 Steps

- ☐ **Step 1: Appoint a Task Force**—generally a combination of key staff and two or three board members.
- ☐ **Step 2: Create the Planning Calendar**—for most organizations without a written strategic plan, this process might range from three to nine months.
- ☐ **Step 3: Seek buy-in**—ensure that the CEO (or senior pastor), senior team, and the board agree that the time is right for a strategic planning process and that there is passion, time, and budget to accomplish the plan. (*You never have a second change to make a first impression.*)
- ☐ **Step 4: Appoint or retain a Facilitator or Consultant**—discern if you have internal expertise to facilitate this process or if you need to recruit a volunteer or retain a consultant.
- ☐ **Step 5: Appoint “Champions”** for each section of the plan (Tabs 1 to 15). If this is your first plan, the CEO may prefer to be the champion for Tab 4: Mission, Vision, Values, BHAG.
- ☐ **Step 6: Plan a *HOOPLA!* Celebration**—create the expectation that you will be successful and put a celebration date on the calendar and assign your best party-planner to organize the event.¹⁰
- ☐ **Step 7: Affirm the Annual Planning Calendar**—to ensure that this is a “rolling” three-year plan (that adds more one year every year—so you are always looking ahead three years), set key target dates for the next 12 months. Build strategic planning into the DNA of your organization so it’s similar to your budgeting and monthly financial reporting cycle—*not a one-time annual event that provokes groans and excuses!*

View how the ProService team celebrated their achievement of a major quarterly goal, as noted in *Scaling Up*. Search “Happy ProService” on YouTube.¹¹

¹⁰ Read Chapter 10, “The Hoopla! Bucket” in John Pearson, *Mastering the Management Buckets: 20 Critical Competencies for Leading Your Business or Nonprofit* (Ventura, CA: Regal, 2008).

¹¹ Read more about ProService and quarterly themes and celebrations/rewards in Verne Harnish, *Scaling Up: How a Few Companies Make It . . . and Why the Rest Don’t – Mastering the Rockefeller Habits 2.0*, (Ashburn, VA: Gazelles, 2014), 153–159.

Commentary on Strategic Plan Team Tasks

Small Teams with Big Tasks!

TAB	Strategic Plan Teams and Tasks	These tasks are generally completed in this chronological order—each task builds upon the previous team’s work.
12	Planning to Plan: Readiness Assessment The 7 Reasons Why Strategic Plans Fail	In the first session with the board and the senior team (or perhaps the senior team and middle management), use this “pop quiz” to assess the organization’s previous experience.
12	The 5 Most Important Questions You Will Ever Ask About Your Organization: #1. What is our mission? #2. Who is our customer? #3. What does the customer value? #4. What are our results? #5. What is our plan?	Resources/outline for the 1- or 2-day planning retreat: <input type="checkbox"/> * <i>Peter Drucker’s Five Most Important Questions: Enduring Wisdom for Today’s Leaders</i> , by Peter F. Drucker, Frances Hesselbein, Joan Snyder Kuhl (Hoboken, NJ: John Wiley & Sons, Inc., 2015) <input type="checkbox"/> <i>Peter F. Drucker’s The Five Most Important Questions Self-Assessment Tool: Facilitator’s Guide</i> , Third Edition (San Francisco: Jossey-Bass, 2010) <input type="checkbox"/> <i>Peter F. Drucker’s The Five Most Important Questions Self-Assessment Tool: Participant Guide</i> , Third Edition (San Francisco: Jossey-Bass, 2010) *Required reading for all staff, board and team members.
4	Mission, Vision, Values, BHAG	Mission: why we exist Values: how we will treat each other and our constituents Vision: what we want to be in the future BHAG: our Big HOLY Audacious Goal for X years ahead
5	Our Customers and What They Value	Use the Drucker materials to discern: <input type="checkbox"/> Our primary customer: “The person whose life is changed because of our work.” <input type="checkbox"/> Supporting customers: list the categories (donors, vendors, churches, grandparents of clients, etc.)
6A	Environmental Scan	Google “environmental scan” and document both external and internal issues that will impact your plan.
6B	S.W.O.T. Analysis	Survey stakeholders and assess: Strengths, Weaknesses, Opportunities, Threats (S.W.O.T.)
6C	Trends (and Trend-Spotting Exercise)	See Tool #15: Board Retreat Trend-Spotting Exercise
6D	Assumptions (“The Radar Report”)	Identify your Top-10 assumptions that undergird your plan (example: “Giving will decrease due to aging donor base.”). List the assumptions on a one-page questionnaire, “The Radar Report,” and ask dozens (or hundreds) of people to evaluate if those assumptions are correct or not.

“Donald Rumsfeld on Assumptions and Planning

“It is possible to proceed perfectly logically from an inaccurate premise to an inaccurate and unfortunate conclusion.”¹²

In his chapter on “Thinking Strategically,” in *Rumsfeld Rules*, Donald Rumsfeld describes a military planning meeting when he served as U.S. Secretary of Defense.

“The objective of the plan was straightforward enough: to defend South Korean sovereignty and defeat the North Korean threat. What I found troubling, however, was that there was no discussion of the key assumptions in which the plan was rooted.”

Rumsfeld dismissed the meeting and they reconvened on the next Saturday.

“That Saturday we met for hours and never discussed any of the plans, only the assumptions.”¹³

TAB	Strategic Plan Teams and Tasks	These tasks are generally completed in this chronological order—each task builds upon the previous team’s work.
7	Spiritual Discernment Process	This team solicits prayer requests from all the teams—and inspires all teams to discern God’s voice. Some teams read Ruth Haley Barton’s book, <i>Pursuing God’s Will Together: A Discernment Practice for Leadership Groups</i> .
8	Three-Year Visionary Priorities (by department)	This team provides templates and instructions so each department will discern three to five “visionary priorities.”
9	Top-5 Goals for Year One	After each department has submitted their visionary priorities, this team will recommend to the Task Force the Top-5 Organizational Goals for the first year of the rolling three-year plan.
10	Board & Senior Team S.M.A.R.T. Goals and Monthly Dashboard Reports	See Tool #11, “Monthly Dashboard Report,” for the template for creating and reporting on three to five annual goals for the board, the CEO, and each senior team member.
11	Communicating Our Results (4 Creative Options)	Use your creativity here! Ask other organizations how they communicate results (per Drucker Question #4). Ideas: <input type="checkbox"/> Create an “Our Results” page on your website—and update it frequently with success stories of how your plan is fostering results. <input type="checkbox"/> Publish an annual booklet of 20-30 pages of testimonial “results” from your clients, customers, or donors. <input type="checkbox"/> Create a video with stories of “results.” <input type="checkbox"/> Appoint a “Results Team” to scour the landscape for poignant stories of ministry results—and then how best to share them with others.

¹² Donald Rumsfeld, *Rumsfeld’s Rules: Leadership Lessons in Business, Politics, War, and Life* (New York: HarperCollins, 2013), 76.

¹³ Ibid., 78.

TAB	Strategic Plan Teams and Tasks	These tasks are generally completed in this chronological order—each task builds upon the previous team’s work.
12	Appendix	Assign one person to the “Appendix Team” and require all teams to submit both final and early drafts of their work. In a “rolling” strategic plan process—the Appendix will be referenced year-round, year-after-year.
1	Introduction	Appoint your best writers and wordsmiths to write the introduction—once the plan is complete. Key word: brevity!
2	Organization-at-a-Glance & Historical Snapshot	Visit organizational websites to catch the flavor of how to format this “organization-at-a-glance” picture. What would a new donor, a new staff member, or a new board member find helpful? Use graphics, timelines, and photos.
3A	Executive Summary	Read executive summaries from other strategic plans. You may need several versions of the executive summary—based on who will be reading it. (Foundations? Major donors? Staff? Volunteers?)
3B	The Rolling 3-Year Strategic Plan Placemat	Reminder! This one-page, 11” x 17” document is the summary of all your hard work. Don’t skimp on graphics, color, or paper quality—but keep it simple. And... proofread!
SUPPLEMENTARY RESOURCES		
13	Customized Strategic Plan Versions (Board, Staff, Volunteers, Donors, etc.)	Consider whether your “in-house” version of the strategic plan report will be relevant to other segments. If not, create appropriate versions for other audiences.
14	HOOPLA! Celebration	Read Chapter 10, “The Hoopla! Bucket” in <i>Mastering the Management Buckets</i> —and plan a celebration when the strategic plan is completed and approved by the board. ¹⁴
15	Update of Annual Planning Calendar	This might be the most important task. Before your plan is complete, you must identify the key deadlines for the next 12 months for keeping your rolling plan—rolling! Most senior teams prefer a quarterly off-site day to review progress on the current year and then add one more year to the rolling three-year plan. (Patrick Lencioni recommends four meeting types, including the quarterly off-site meeting.) ¹⁵

“If you have more than five goals, you have none.”¹⁶

Peter Drucker

¹⁴ Pearson, *Mastering the Management Buckets*, 143–55.

¹⁵ Patrick Lencioni, *Death by Meeting: A Leadership Fable . . . About Solving the Most Painful Problem in Business* (San Francisco: Jossey-Bass, 2004), 249.

¹⁶ Peter F. Drucker, Frances Hesselbein, and Joan Snyder Kuhl, *Peter Drucker’s Five Most Important Questions: Enduring Wisdom for Today’s Leaders* (Hoboken, NJ: John Wiley & Sons, 2015), 63.

4. Recommended Faith-Based Resource

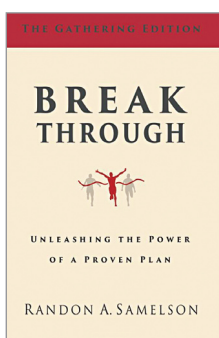
Breakthrough: Unleashing the Power of a Proven Plan



Attn: Church Boards

We recommend this powerful book, based on 1 Chronicles 28-29. Use this biblical framework to enrich your church's strategic planning process.

6 Planning Steps from 1 Chronicles 28-29	WORKSHEET: Our board's insights from <i>Breakthrough</i> , by Randon Samuelson
1) Inspiring Vision	
2) A Credible Plan	
3) The Right Leader	
4) Initial Funding	
5) Going Public	
6) Sharing Credit	



Must-read!
One of the best faith-based books on strategy and strategic planning.



The Key Log Question

“Other than money, what one opportunity (or obstacle) if captured (or removed) would most advance your mission/vision?”

Author Randy Samelson helps organizations identify key opportunities or obstacles. They focus on the “Key Log.”

Borrowing the perfect metaphor from Fred Smith, Sr., Samelson explains: “...in the lumber industry when trees are cut and floated down rivers, they are susceptible to log jams. Over time, the industry learned that through satellite images and computer modeling, they could identify the one key log that if blown-up would release the log jam allowing the logs to move toward their destination.”

Individuals and organizations also experience the equivalent of ‘log jams.’ Progress is stopped.” And Samelson says there are “biblical principles that can be used to identify the key impediment and wise strategies to eliminate it.”¹⁷

STOP!

Before you fill in your Strategic Plan Placemat, ask “The Key Log Question.”

¹⁷ Randon A. Samuelson, *Breakthrough: Unleashing the Power of a Proven Plan* (Colorado Springs: Counsel & Capital, 2014), 19.

❑ 5. The G.N.O.M.E. Chart

Delineating the Board's Role and the Staff's Role in Strategic Planning

SUMMARIZE YOUR PLAN WITH A G.N.O.M.E. CHART. *This would have helped Christopher Columbus, who did not know where he was going when he left, and did not know where he had been when he returned home!*

Read Chapters 1, 2, and 3, “The Results Bucket,” “The Customer Bucket,” and The Strategy Bucket,” in *Mastering the Management Buckets* before you begin the strategic planning process. Use this “G.N.O.M.E. Chart” (Goals, Needs, Objectives, Methods, Evaluation) to list your three to five annual “S.M.A.R.T.” goals (or, if you prefer, label them “Visionary Priorities”).¹⁸

G.N.O.M.E. CHART

Board/Staff Focus: Goals, Needs, Objectives			*Staff Focus: Methods, Evaluation	
GOALS	NEEDS	OBJECTIVES	METHODS*	EVALUATION*
1.				
2.				
3.				
4.				
5.				

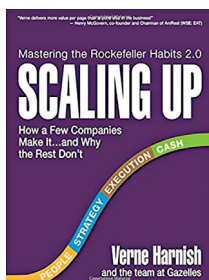
*Typically, the board of directors should focus on Goals, Needs, and Objectives (Strategy)—and when the goals are crystal clear (and meet the “S.M.A.R.T.” test), the board should give freedom for the staff to focus on Methods (Tactics) and Evaluation. The Evaluation column should document the process whereby the staff will evaluate and report to the board whether or not the methodology is actually achieving the goals and objectives—and if there is alignment with the vision, mission, core values, and BHAG. For more on “Needs,” read “The Customer Bucket” chapter.

¹⁸ Pearson, *Mastering the Management Buckets*, 62–64.

❑ 6. More Resources on Strategic Planning

Be strategic about strategic planning. *“Insanity is doing the same thing over and over again and expecting different results.”*¹⁹

- ☑ **DELEGATE YOUR READING!** Inspire every board member and senior team member to select a book or resource from the list below (or from your staff resource library)—and share insights at your next Strategic Planning Task Force meeting.



- ❑ **Scaling Up:**
How a Few Companies Make It . . . and Why the Rest Don't Mastering the Rockefeller Habits 2.0
by Verne Harnish

Recommended by Dan Busby, this book was John Pearson's 2018 “Book-of-the-Year” from his book reviews in *Your Weekly Staff Meeting* eNews.

- ❑ *Playing to Win: How Strategy Really Works*, by A.G. Lafley and Roger L. Martin
- ❑ *Little Bets: How Breakthrough Ideas Emerge From Small Discoveries*, by Peter Sims
- ❑ *How the Mighty Fall and Why Some Companies Never Give In*, by Jim Collins
- ❑ *101 Mission Statements From Top Companies: Plus Guidelines for Writing Your Own Mission Statement*, by Jeffrey Abrahams
- ❑ *Peter Drucker's Five Most Important Questions: Enduring Wisdom for Today's Leaders*, by Peter F. Drucker, Frances Hesselbein, and Joan Snyder Kuhl
- ❑ *Driving Strategic Planning: A Nonprofit Executive's Guide*, Second Edition, by Susan A. Waechter
- ❑ *The Nonprofit Dashboard: A Tool for Tracking Progress*, by Lawrence M. Butler
- ❑ *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*, by Jeanne Bell, Jan Masaoka, and Steve Zimmerman
- ❑ *5: Where Will You Be Five Years from Today?* by Dan Zadra

***“Don’t say you don’t have enough time.
You have exactly the same number of hours per day that were given to
Helen Keller, Louis Pasteur, Michelangelo, Mother Teresa, Leonardo da Vinci,
Thomas Jefferson and Albert Einstein.”***²⁰

Dan Zadra

¹⁹ Adapted from “The Strategy Bucket” in *Mastering the Management Buckets Workbook: Management Tools, Templates, and Tips from John Pearson*, 2d ed. (San Clemente, CA: A Pearpod Resource, 2018), 33–45.

²⁰ Dan Zadra, *5: Where Will You Be Five Years from Today?* (Seattle: Compendium, 2009), 3.

- ❑ *Harvard Business Review's 10 Must Reads on Strategy* (including the featured article "What Is Strategy?" by Michael E. Porter)
- ❑ "What Is Strategy?" by Michael E. Porter (*Harvard Business Review*, Nov./Dec. 1996)
- ❑ *Thinkpak: A Brainstorming Card Deck*, by Michael Michalko
- ❑ *Rumsfeld's Rules: Leadership Lessons in Business, Politics, War, and Life*, by Donald Rumsfeld
- ❑ *Illuminate: Ignite Change Through Speeches, Stories, Ceremonies, and Symbols*, by Nancy Duarte and Patti Sanchez
- ❑ *The Attacker's Advantage: Turning Uncertainty Into Breakthrough Opportunities*, by Ram Charan
- ❑ "The Big Lie of Strategic Planning," by Roger L. Martin (*Harvard Business Review*, Jan./Feb. 2014)
- ❑ *Managing Transitions: Making the Most of Change* (25th Anniversary Edition), by William Bridges



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The following strategic planning resources will be especially helpful to church boards and church staff members.

- ❑ *Barna Trends 2018: What's New and What's Next at the Intersection of Faith and Culture*, by Barna
- ❑ *Breakthrough: Unleashing the Power of a Proven Plan*, by Randon A. Samelson
- ❑ *Effectiveness by the Numbers: Counting What Counts in the Church*, by William R. Hoyt
- ❑ *Simply Strategic Stuff: Help for Leaders Drowning in the Details of Running a Church*, by Tim Stevens and Tony Morgan
- ❑ *Well Connected: Releasing Power, Restoring Hope Through Kingdom Partnerships*, by Phill Butler
- ❑ *The Longview: Lasting Strategies for Rising Leaders*, by Roger Parrott
- ❑ *TRUST: The Firm Foundation for Kingdom Fruitfulness*, by Dan Busby
- ❑ *Visioneering: God's Blueprint for Developing and Maintaining Personal Vision*, by Andy Stanley
- ❑ *Mastering the Management Buckets Workbook: Management Tools, Templates, and Tips from John Pearson*, Second Edition, by John Pearson

Note: To read John Pearson's reviews of the above books, just google "[book title], John Pearson's Buckets Blogs," or visit https://urgentink.typepad.com/my_weblog.

The annual update and master list of books reviewed by John, categorized within John's 20 buckets/core competencies, is posted at:
<http://managementbuckets.com/book-bucket>.

Effective Boards Are Alert to Relevant Trends

ECFA Research Says...



Study the Trends

“Our board devotes creative energy and board meeting time to assess risks and opportunities—and thus is well-informed about the outside forces impacting the organization.”

