

Strategic Positioning – The *New* Strategic Planning

Sample Training Workbook



Overview

Objectives

- Define and describe an enhanced strategic plan
- Introduce brand, image, and position as planning context
- Integrate planning, marketing, and communications
- Challenge veteran staff and board to apply more sophisticated tools towards organizational development and growth

Outcomes

- Define and apply concepts of brand, position, and image
- Update strategic planning for a more integrated strategic positioning approach
- Understand how to strategically position your organization in the community for stronger visibility and results
- Use position to move to the next level

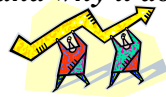
Agenda

- Introduction
- Definitions and Frameworks
- Strategic Planning
- Strategic Positioning
- Integrating Planning, Positioning, and Organizational Development
- Application and Questions

Strategic

Deliberate, calculated decisions or design, based on an understanding of external, market, and internal forces and current and expected conditions; broad, organization-wide, over-arching all programs and services

“Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does and why it does it.” (Bryson)



“The essence of strategy is choosing what not to do.” (Porter)

Definitions

Brand: An organization's (or program's) essence. The distinguishing, enduring, and endearing characteristics. Brand is the distinct quality or experience that becomes universally anticipated by the constituents.

Goals: The results or outcomes in specific, measurable, attainable, realistic, time-framed terms that define what will be achieved or accomplished by a variety of programs, tasks, or activities.

Identity: The distinct and unequivocal definition and description of the program. Defined by why, what, and how it does what it does. Typically made explicit by the mission, vision, values, goals, and objectives.

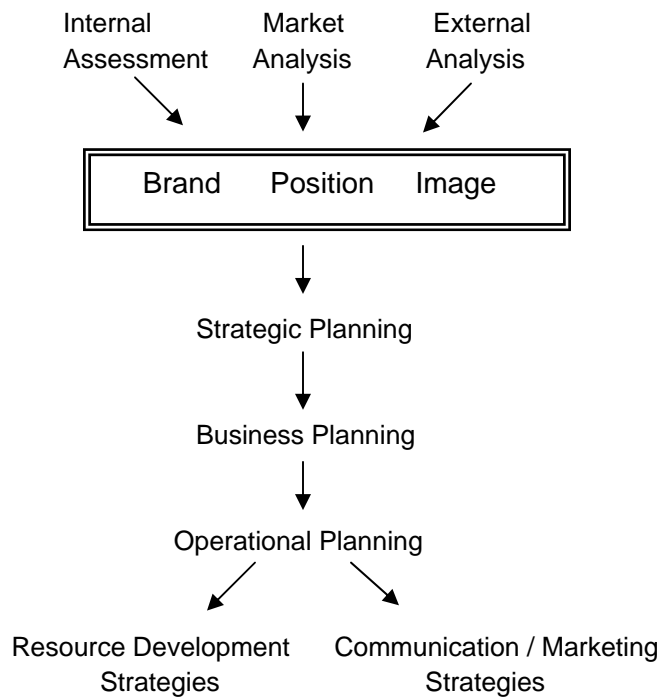
Image: How others perceive the organization; should be aligned with identity.

Imperatives: Those things that emerge as essential for the organization's strategic focus. Based on the situation analysis, likely to be the obvious conclusions of an objective, analytical, systematic, and comprehensive process.

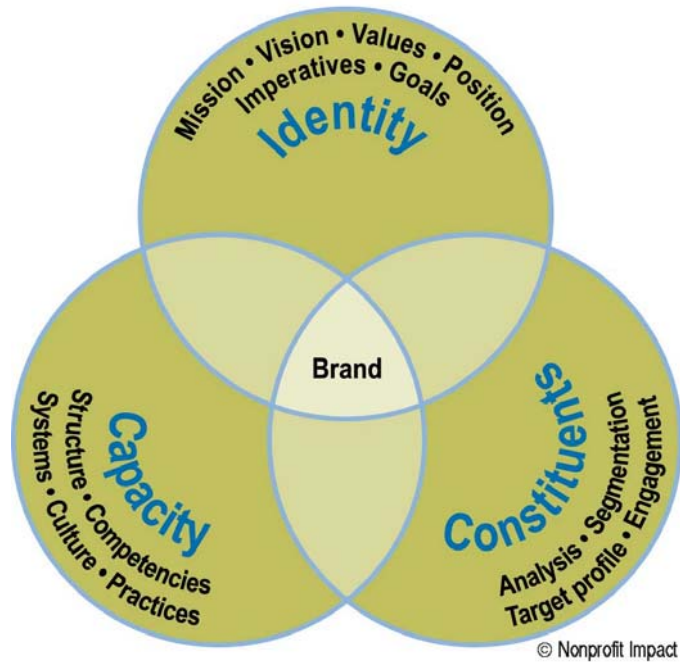
Objectives: Those few strategies that will most efficiently and effectively achieve strategic goals and align with the organization's unique purpose, method, and niche.

Position: The place or niche the program occupies within a sphere of influence. By definition, position is relative to the other programs that operate within that sphere.

Frameworks

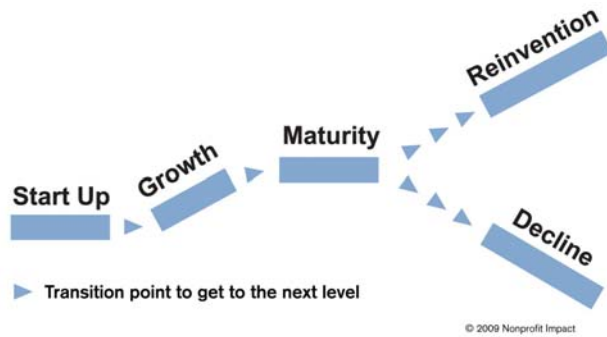


Integrated Strategy



Next Level

Refers to an organization's ability to leverage assets and brand to be more successful towards achieving mission-related results; to reach and engage a larger and more supportive constituency; and to be more strategically, operationally, and financially focused, stable, and sustainable.



Strategic Planning Outline

Situation Analysis

- External – socio-economic-political
- “Industry” trends
- Institutional landscape
- Demographic and psychographic trends and issues
- Internal

Strategic Issues / Decisions

- Fundamental, core

Mission

- Purpose, short declarative and simple – why you exist

Vision

- Descriptive, visual image of what it looks like when you are successful

Imperatives

- Those things you must do, to the exclusion of all else, to be successful moving forward

Goals

- Specific, detectable, realistic *outcomes* / results - what you will accomplish

Objectives

- How you achieve goals – the few overarching strategies (not all the tasks) towards outcomes

Operating Plan

Strategic Goal 1	Critical Tasks	Necessary Outcome	Staff/ Board/ Volunteer Responsibility	Due Date
Objective 1				
Objective 2				
Objective 3				

Strategic Positioning

Overview

- More sophisticated planning considers brand, position, and image.
- A more externally focused, market-driven analysis to define the organization's identity and niche.
- Position considers competitive environment and niche opportunities.
- Potent organizations fully occupy and “own” their niche.
- Positioning capitalizes on distinction and assets to go to the next level.

Can't *sort of* position, have to build whole organization around position, requiring focus and deliberate planning and development.



Positioning quite literally defines the tables at which you sit

Positioning Process

Situation analysis

- Trends, issues
- Industry growth and changes
- Institutional landscape

Competitive / comparative environment

Constituent / potential constituent interests and unmet needs

- Demographics and psychographics – how people behave relative to a product or cause
- Market trends
- External to organization, not satisfaction surveys
- Opportunities and unmet needs

Organization's distinctive competencies and assets

- Underutilized assets
- Distinct history, brand, strength
- Latent or untapped potential

Gaps, needs, or unsolved problems

- Overlap of external needs and internal assets

Alternative positions

- Geographic sphere
- Competencies
- Market niche; Other?

Strategically advantageous / feasible / necessary position

- Position decision
- Organizational implications
 - May redefine brand, image
 - Implications for strategic decisions

Then, strategic plan based on position

- See strategic plan outline

Organizational design and development

- See *Integrated Strategy*

The Next Level: Positioning or Re-positioning

Impact and Success

Strategic focus, niche in marketplace to be the model (not done before)

Re-invigoration, Reverse Declining Market-share

Leverage Assets and Organizational Sustainability

Power and Influence

Own a niche, expectations

Broaden Market Share, Presence

Sample Outline: Positioning Plan

- 1) Introduction
 - a) Description
 - b) Purpose and goals
 - c) Methodology

- 2) Situation Analysis
 - a) External trends and issues
 - b) Industry analysis
 - c) Comparative analysis
 - d) Market information
 - e) Perceptions
 - f) Opportunities

- 3) Organizational Capacity
 - a) Assets
 - b) Distinctive competence
 - c) Obstacles

- 4) Position Analysis
 - a) Current position, brand, image
 - b) Positioning opportunities and alternatives
 - c) Scenarios

- 5) Selected Position
 - a) Strategic issues
 - b) Target market and marketing implications
 - c) Brand and image
 - d) Strategic focus

- 6) Organizational Implications
 - a) Strategic plan
 - b) Design and development
 - c) Programming and outreach
 - d) Strategic alliances

If you would like additional information about Strategic Positioning, please contact Jennifer Burstein at jennifer@nonprofitimpact.com to request a free copy of our educational booklet on this topic.

*For additional information
about the information presented here, or other organizational
development tools, please contact Jennifer Burstein at
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