

# DEVELOPING A STRATEGY FOR YOUR ORGANISATION



# Developing a Strategy for Your Organisation

## Template

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*This template is not meant to be prescriptive, but it provides you with a useful summary of what you might include in your strategy document.*

*Your strategy is meant to help you develop an action plan that you can use to attain your organisation's longer term aspirations and goals.*

### 1. Introduction

- a) Why a strategy? *[Route map for your organisation; help with planning towards long term sustainability; clarification of roles and responsibilities / smarter working etc.]*
- b) How your strategy has been developed / who have you consulted?
- c) Summary of key strategic objectives. *[What are your main priorities for the duration of the strategy].*

### 2. Context and rationale for the work of your organisation

- a) What is the context for the work that you do? *[National and local policies; why is it deemed to be important?]*
- b) Who is your target group? *[Detailed description; personal characteristics; location etc.]*
- c) Why do they need help / support? *[What issues / problems are they facing and why?]*
- d) What evidence do you have to support your views? *[Research / data / target audience consultation etc.]*
- e) What might happen to your target group without the support of your organisation?
- f) Brief summary of the services you will provide to help the target group.
- g) Who are your key stakeholders? *[Statutory bodies / voluntary organisations / schools etc.]*
- h) Who else is working in the space you occupy? *[Are they collaborators / competitors?]*

### 3. Current status of your organisation

- a) Brief history of your organisation. *[When it was established; track record; notable achievements; awards won etc.]*
- b) What services are you currently delivering?
- c) Can you quantify the impact and outcomes you are achieving? *[How do you measure these?]*
- d) Description of your financial status.
- e) Brief description of your aspirations / potential for growth.

### 4. Mission / Vision / Values

- a) Mission - an action-based statement that declares the purpose of your organisation and how it serves its customers.

- b) Vision - aspirational statement made by your organisation that articulates what it wants to achieve.
- c) Values - actions that define the behaviour of your organisation.

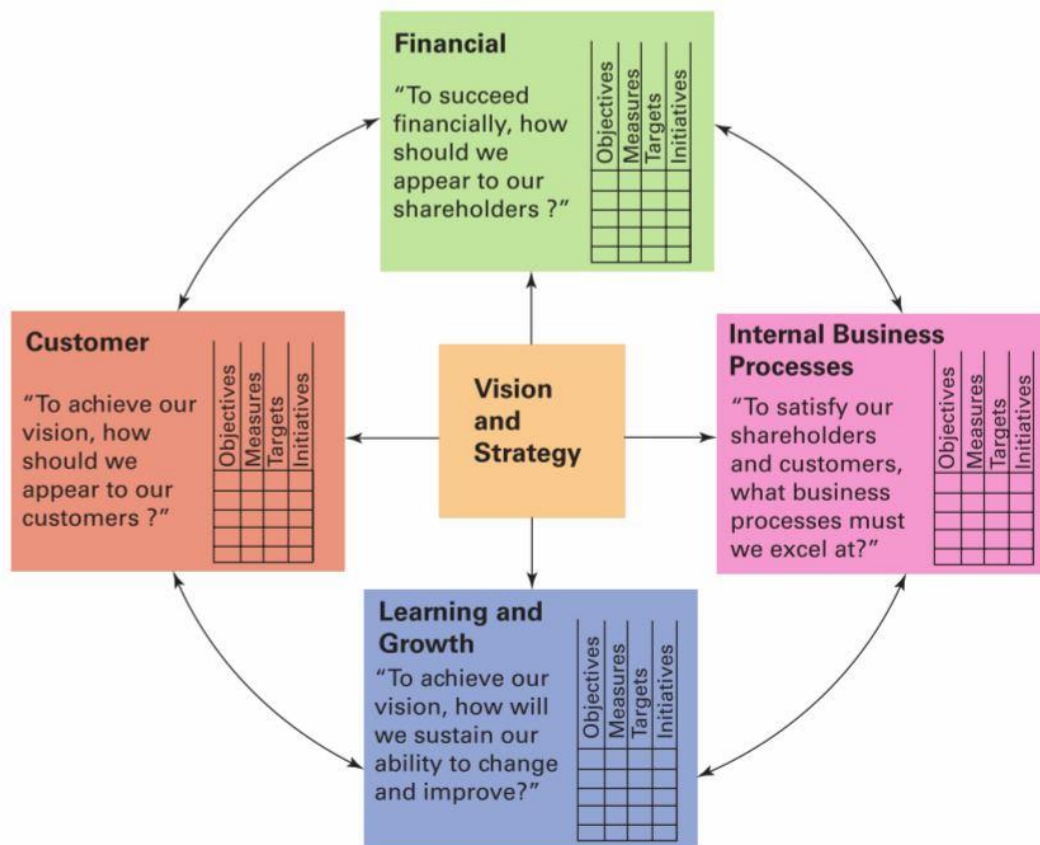
**5. Resource Availability (summary of the internal resources available to your organisation)**

- a) Description of management group
- b) Staff
- c) Volunteers and other supporters
- d) Description of operational resources

**6. Strategic objectives**

Use a 'Balanced Scorecard' to include:

- a) Financial
- b) Customer
- c) Internal Process
- d) Organisational Capacity or Learning and Growth



- a) For each quadrant set objectives / targets / measure / initiatives with aligned KPIs.

## **7. Equality, Diversity and Inclusion**

- a) Describe your approach to promoting equal opportunities, diversity and inclusion.  
*[What policies do you have in place to ensure service users are treated equally and all sections of the community are made welcome?]*

## **8. Safeguarding**

- a) If you are an organisation that works with vulnerable adults and young people describe the policies you have in place to safeguard all service users and how these are implemented.

## **9. Other Policies and Procedures**

- a) Summarise other key policies you have in place, such as Data Protection, GDPR compliance, health and safety and business continuity etc.

## **10. Marketing and communications plan**

- a) Describe your marketing and communications plan, including all channels to be used.  
*[Website; social media; press; other media; printed materials etc.]*
- b) Customer development plan. *[Describe how you will ensure your proposed target audience know about you and can access you; what channels will you use to reach specific cohorts of service users?]*
- c) Communicating the strategy. *[How will you broadcast your marketing plan; what tools will you use; how will you promote your successes and draw attention to the work that you do?]*

## **11. Delivering the Strategic Plan**

- a) A tactical plan to achieve each strategic objective; what, who, when, where, outcomes. *[This can be a template as an appendix].*
- b) Risk assessment. *[Describe the key risks involved in delivering the Strategic Plan and how you will mitigate these].*

## **12. Monitoring and reviewing the Strategic Plan**

- a) Statement about how this will be done, by whom and when; how will changes be agreed.

## Appendix One

### The Four Perspectives in a Balanced Scorecard – Bernard Marr

<https://bernardmarr.com/the-four-perspectives-in-a-balanced-scorecard/>

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Developed by Robert Kaplan and David Norton, the Balanced Scorecard is an extremely influential management tool that remains enduringly popular with organisations around the world. At its most basic level, the Balanced Scorecard helps organisations to clarify their strategy and communicate the business's top strategic priorities and objectives.

If you've ever seen the Balanced Scorecard in action, you'll know it's essentially a strategic framework, divided into four areas (called "perspectives") that are critical to your success. The perspectives can be tailored and tweaked to suit your organisation's circumstances.

#### **The Financial perspective**

Essentially, any key objective that is related to the organisation's financial health and performance may be included in this perspective. Revenue and profit are obvious objectives that most organisations list in this perspective. Other financial objectives might include:

- Cost savings and efficiencies (for example, a specific goal to reduce production / delivery costs by 10% by a given date)
- Profit Margins (increasing operating profit margins, for instance)
- Revenue sources (for example, adding new revenue channels)
- Developing a fundraising plan

#### **The Customer perspective**

This perspective focuses on performance objectives that are related to customers / service users and the market. In other words, if you're going to achieve your financial objectives, what exactly do you need to deliver in terms of your customers and market(s)?

Included in this perspective you might find objectives for:

- Customer service and satisfaction
- Market share (such as, growing market share in new areas of delivery or attracting new types of service users)
- Brand awareness (for example, increasing interactions on social media)

#### **The Internal Process perspective**

What processes do you need to put in place to deliver your customer- and finance-related objectives? Here you would set out any internal operational goals and objectives – or, in other words, what does the organisation need to have in place and what does it need to do well in order to drive performance?

Examples of internal process objectives might include:

- Process improvements (for example, a needs assessment tool to determine what support your services users need and how improvements are measured].

- Capacity utilisation (using technology to boost efficiency, for instance e.g. implanting a CRM system).
- Developing an environmental strategy.
- Introducing improvement tools or acquiring accreditation; [Matrix; Cyber Essentials etc.]

### **The Learning and Growth perspective**

This final perspective considers the more intangible drivers of performance. Because it covers such a broad spectrum, this perspective is often broken down into the following components:

- Human capital – skills, talent and knowledge (for example, skills assessments, performance management scores, training effectiveness)
- Information capital – databases, information systems, networks and technology infrastructure (such as, safety systems, data protection systems, infrastructure investments)
- Organisational capital – culture, leadership, employee alignment, teamwork and knowledge management (for example, staff engagement, employee net promoter score, corporate culture audits)

*It is vital that organisations understand the connection between the perspectives. They should not be seen in isolation, but as an integrated set of objectives that are interlinked and that support each other.*

## Action Planning

No	Strategic Objective	Measure	Target	Initiative	Lead	Outcomes / 2022/23	Outcomes / 2023/24	Outcomes / 2024/25
1	E.g. Create an independent financial mechanism to achieve a) working capital; b) external income and contracts.	Fundraising plan	8 successful bids Paid for service (consultancy)	Programme development / application submissions to:  Key Fund Shared Prosperity Fund (SPF) X6 others	Staff	Key Fund SPF x2 grant/tenders	SPF (ongoing) x2 grant/tenders Consultancy offer	SPF (ongoing) x2 grant/tenders
2								
3								
4								
5								
6								