



Evolution of a Strategic Plan

Overview of the Strategic Thinking Process

Strategic planning is important for any organization in order to choose a direction for the future, to guide program development and provide a blueprint for the appropriate allocation of resources. Frequently, organizations devote a great deal of energy to developing a strategic plan and then feel the job is done for at least five years. The new trend is to be in a state of thinking (planning) strategically on an ongoing basis and updating strategies as new information that influences the organization and its overall direction becomes available. It is important to incorporate the concept of nimbleness into the organization's thinking. The world moves so rapidly now that any organization must position itself to be able to move quickly with any new opportunities and initiatives.

The last formal strategic plan developed by Toastmasters International was published in 2000. Since that time, much has changed. The trends toward globalization of economies and advancing technology that facilitate virtually instantaneous communication have had a tremendous impact, not just on what can be accomplished, but on expectations of what should be done. The organization has been experiencing unprecedented growth, notably in areas outside of North America. A new infrastructure has been created at World Headquarters to provide an improved platform for member services.

With this as background, in February, 2003, the Strategic Planning Committee began a new process for planning the strategic direction of the organization. In August, 2003, the Board of Directors affirmed a desire to pursue a new (additional) strategic focus for the organization – namely that of leadership development. Specifically, the goal is to become as well known for leadership development as the organization is currently known for public speaking.

A framework, entitled “Four Planning Horizons”, adapted from Collins and Porras’ 1994 book *Built to Last*, was utilized to structure the thinking and identify elements that will guide our actions. Briefly, this tool is used to clarify an organization’s core purpose and values and relate those to an envisioned future, which may be articulated as a big audacious goal (BAG). A BAG is something that is very long range; it may take a lifetime to achieve. On a 10 to 20-year range, what are the strategic principles that will guide decision making? What are the mega issues facing the organization? Mega issues are shaped by global trends and assumptions about the future. On a two-to five-year horizon, what are the objectives and strategies that will be necessary to move the organization toward its envisioned future?

Finally, on an annual basis, what are the priorities for action planning?

The Strategic Planning Committee has worked through each of these horizons and continues to spend time at each meeting to further this process step by step. The organization’s existing values statement, vision and mission statements were reviewed and reaffirmed. Environmental scanning data about global trends and mega issues that will affect the organization were reviewed. Additionally, market research was conducted to gauge the level of public awareness about the organization, perceptions of our programs and specifically perceptions about the leadership development aspect of our programs.

The Board of Directors has approved a big audacious goal, six major objectives, and some strategies related to each objective. Among the strategies, several were identified as “long term enablers”. A long term enabler is a strategy that is considered essential to support other strategies and ultimately achieve the objective. Additionally, strategic principles to guide our decision making have been developed. Each of these elements is delineated.

Big Audacious Goal

Toastmasters International is recognized throughout the world as the undisputed expert in communication and leadership skills development.

Mega Issues

▶ Time

Time is an increasingly valuable commodity. How do we ensure that our products and programs have a high-perceived value for the time invested?

▶ Generational Differences

Each generation learns and interacts differently from other generations. How will we ensure that we attract and retain people from different generations into our organization?

▶ Cultural Differences

Different cultures have different perspectives, needs and motivations. How will we ensure that our programs are flexible enough to meet these needs?

▶ Technology

Technology is changing the nature of human interaction and transference of information. How can we ensure that we use technology in ways to improve our organization but preserve the core essence of face-to-face communication?

6 OBJECTIVES, 30 STRATEGIES, 5 LONG-TERM ENABLERS

(long-term enablers are in italicized text)

1. Consistently achieve membership growth.

1. Increase retention of existing members.
2. Increase recruitment of new members.
3. Explore new mechanisms for building new clubs.
4. Increase retention of existing clubs.
5. *Explore opportunities for the youth market.*
6. Increase visibility and accessibility of clubs.

2. Increase the recognition of Toastmasters International as expert in the fields of communication and leadership.

1. *Devise mechanisms to partner with corporations.*
2. Develop new models to provide materials to human resource professionals.
3. Create strong branding and consistent marketing initiatives.
4. Explore the creation of certificate programs for communication and leadership skills.
5. Devise mechanisms to create awareness of our expertise.

3. Become as well known for leadership development as for communication development.

1. *Develop a structured leadership skills program.*
2. Explore the opportunities for marketing selected materials outside the organization.
3. Explore licensing of materials to universities and other organizations.
4. Develop mechanisms to create awareness of leadership program.

4. Provide programs that are adaptable for different generations and cultures, and for emerging technologies.

1. Explore new materials and varied media.
2. Explore different models of delivering program for various markets, including youth, corporations, etc.
3. *Develop strategic alliances with organizations and associations.*
4. Update existing materials to reflect contemporary usage and expectations.
5. Use technology to provide online resources and support.

5. Achieve global market penetration.

1. Create alliances with major international corporations and associations to grow Toastmasters outside North America.
2. Leverage relationships with individuals and organizations (e.g. existing Toastmasters who work or live in other than their home country).
3. Seek nontraditional approaches to promoting TI program in developing nations.
4. Work with governments that have declared English as a second language.
5. Send ambassadors to emerging markets to stimulate growth.

6. Achieve excellence in the quality and consistency of programs, products, processes and services throughout the organization.

1. Ensure that programs, products, processes and services evolve to meet strategic objectives.
2. *Create a culture of continuous improvement.*
3. Create a service orientation at every level of the organization.
4. Core values, integrity, dedication to excellence, respect for the individual, service to the member, will permeate all our activities.
5. Enhance the culture of teamwork among volunteer leaders, members, and World Headquarters staff.

Strategic Principles for Decision Making

Boundary Rules

- ▶ Our tax exempt status (501(c)(3)) is one of our most valuable assets and must always be protected.
- ▶ Be fiscally responsible.
- ▶ We must be mission-driven.

Priority Rules

- ▶ Balance the constraints of volunteer efforts and time.
- ▶ Give priority to the introduction of products and services that provide benefits to the greatest number of members and customers.
- ▶ Following our core values, integrity, dedication to excellence, service to the member, and respect for the individual, must be the primary consideration in any endeavor.
- ▶ Adequate funding of critical success factors always comes first.

Timing Rules

- ▶ We need to anticipate and respond quickly to developments in the global marketplace and seize opportunities as they arise.
- ▶ Products, services, and programs will be developed and managed on a life-cycle basis with specific evaluation criteria.

How-to Rules

- ▶ A successful roll-out plan for new programs/services will include appropriate support materials for implementation.
- ▶ Products and services will be supported with appropriate market research, a business case, and a life-cycle management process.
- ▶ Achieve consistency in products and services to strengthen brand.
- ▶ Keep a healthy balance between historical review and the anticipation of trends and potential change.
- ▶ Our products and services will be developed and positioned for global use and, where necessary, be adaptable for local requirements.
- ▶ Be attentive to membership and club retention while fostering growth.
- ▶ All goals must conform to the SMART acronym.