

Transforming Ourselves for the Future

Taking
Control of
Our Ship

Overall Purposes

1. To be proactive with _____ to best meet their requests for help from us



To dramatically improve how we work with _____

2. To transform ourselves so we become more "nimble" collectively to serve our current, future and unknown clients

3. To know we've been part of "moving the dial" of the work of our clients



To contribute to our real mission

Specific Purposes of this Planning

Part #1: To take "snap-shots"

- 18-24 months from now (deadline)
- today (current date)



- to guide us as we explore the future TOGETHER

Part #2: To identify 4-6 KEY MOVES to **significantly improve** how we serve our current clients with results of "tests" by Deadline

Part #3: To identify 3-5 "ACTIONS" to move us forward as a "svelte / agile" team to take us into a challenging future serving our clients

Part #4: To create a statement of our essence to guide us towards our future

Part #5: To walk away with Action Plans tied to Top Ideas

Non-Purposes of Sessions

- To go outside of what we can control – higher level structural issues
- To spend time on issues with individual consultants (versus how we can work with them more effectively)
- To deal with outcomes of CJC analysis

Part #1 **R-Factor Question**

If we were here 18 months from now looking back to TODAY what Absolutely has to be in place for us to be pleased with our PROGRESS

What are the next “revolutions” in our field and ways we can address them

Part #2 **Exploring Our Work**

How we can be **dramatically** more effective in our current services

What **New Services** could we provide

What **New Services** are our clients just waiting (begging) for us to provide

New Ways we can offer our menu of services

Ways to **WOW** our Clients

Part #3 **3-Word Statement of Essence**

Part #4

How can we become **Absolutely Indispensible** to our Clients versus being “1 hit wonders”

Ways we can be more **Proactive** versus **Reactive** to....

How can we dramatically improve our **“nimbleness”** and **“sveltness”** as a team

Part #5

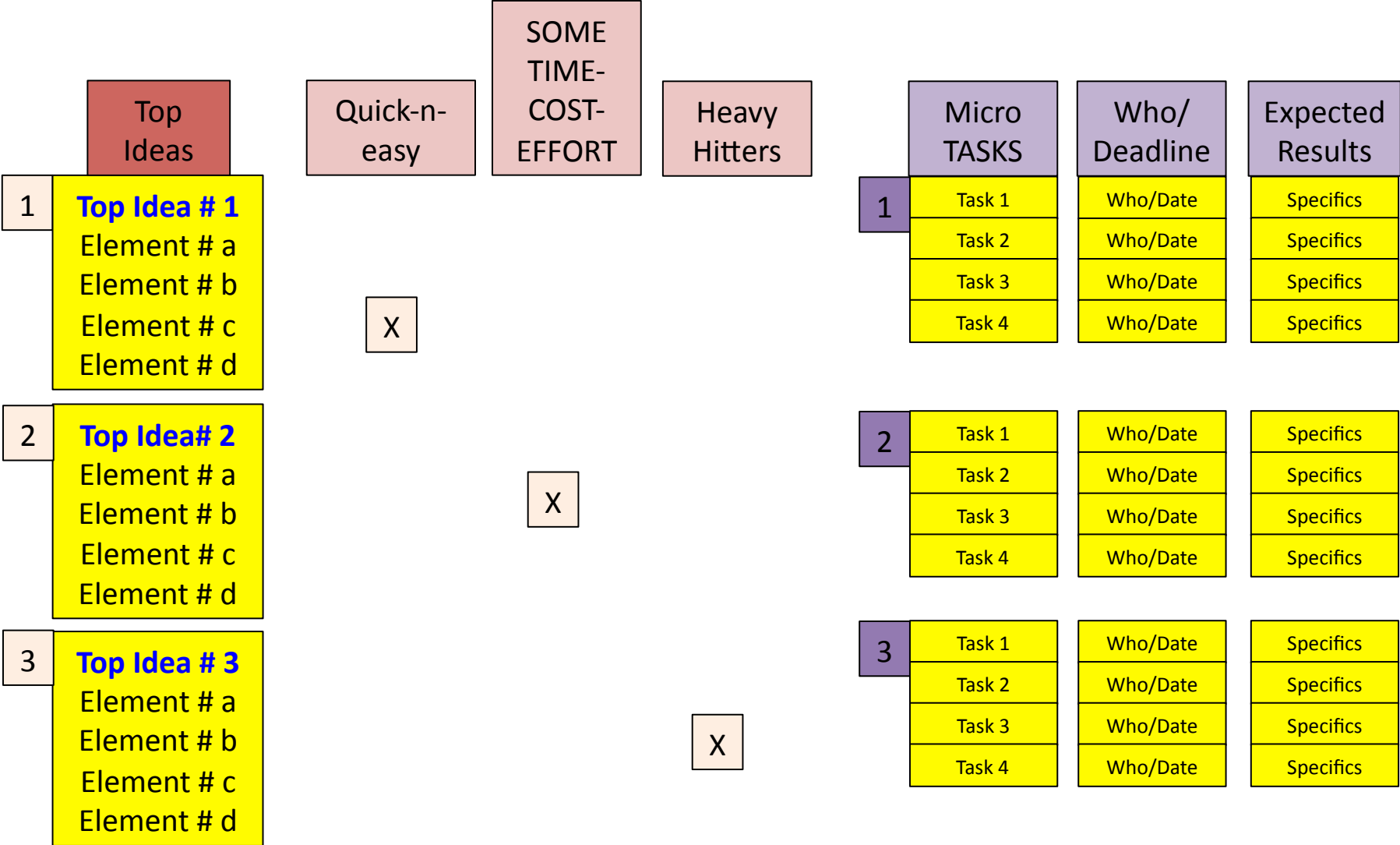
Addressing the Real World

How we will GUARANTEE this plan moves forward and doesn't't become another "Report On a Shelf Gathering Dust"

Potential YAMA question

If our founder were here he'd be exceptionally pleased to see that we were able to

Focusing Into Concept
Improve How We serve Our Current Clients



Communications Plan

Specific Messages	Who Needs To Know	What They Need To Know	Who Will Tell Them	How Will We Tell Them	Deadline
1. Message	Trustees	1,2,4	Name	Method	Date
2. Message	Audience	1,4,6	Name	Method	Date
3. Message	Audience	2,4	Name	Method	Date
4. Message	Audience	1,2,6	Name	Method	Date
5. Message					
6. Message					

What Went
Well?

What Would We
Change For Our
Next Session?

Lessons
Lerned