

Creating a Strategic Online Plan CASE District II Workshop Outline

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Themes

- The tabula rasa: approach opportunities with an open mind; promote imaginative thinking; don't limit your vision to vendor offerings
- New technology with constituent relations: confusing the two; the rate of behavioral change vs. technological change
- Quality information: how to solicit, recognize and use it
- The culture of innovation: how to nurture and use strategically
- The importance of planning

Agenda

- The Internet
- Innovation: benefits
- Strategic planning: what, why, how
- Leadership strategies for the future
- Characteristics of a strong online presence

The Internet

Lessons learned

- The value of experience
- The necessity of planning
- Focus on core function
- Acquiring talent
- Metrics reassessed
- The foundation of organizational stability (leadership, financing, experience, focus, commitment)

Communications trends

- From hierarchies to networks
- Information volume is growing
- Communication will become more efficient but not before it is more complicated
- Result: you can extend your reach

Keeping up-to-date

- Online resources

Know your institution and assess online initiatives

- Attitude towards online efforts: coordination, consolidation
- Integration: databases, user interfaces, decentralization of functions

- Resources you can leverage: online programs, services, etc.
- New initiatives: identify growth areas, be proactive in seeking opportunities

How to value your unique assets in an online world

- Content
- Resources

Progress in the age of new media and information technology

Maintaining the status quo vs. affecting change

- Incremental improvement: sustaining current trajectory
EX: Newsletter: mimeograph, photocopy, wp and printer, desktop publishing
- Innovative leaps: redefined performance trajectories
EX: Online newsletter can provide call to action (readers don't just read it....they use it differently.... changes the nature of how you relate...)
 - Catalyst for growth
 - Distributes expertise and access
 - Opportunity to address on new/different constituent segments
 - Enables growth in smaller sectors
 - Successful when developed autonomously
 - If proactively managed, can evolve over time to create value for other segments; becomes a product platform

Quality input and information

- Focus on solutions: describes features, functionality, products and services
- Focus on outcome: describes goal or process to achieve

Ask the right questions

- Does research capture requirements or desired outcomes?
- Good information tells you what criteria will be used to evaluate deliverables

Discriminate among types of information

- Determine what you're trying to achieve, not what you are trying to make or buy
- Don't confuse solutions with outcomes
- Tease outcomes from solutions to pinpoint your goal

Metrics that matter

- Build metrics into outcomes you solicit to evaluate success down the road
- Test information you receive; measure importance

Preparing for a strategic plan

What?

- Asks conceptual questions which provide answers that guide you
- Provides framework; does not make future decisions

Why? Introduces a new set of decision forces

- Encourages imagination and experimentation
- Simulates the future
- Applies a systems approach
- Forces the setting of objectives
- Reveals and clarifies future opportunities and threats
- Provides framework for decision making throughout your organization
- Reveals strategic issues
- Rejects irrelevant ideas

Define your purpose

- Provide or change direction?
- Reveal strategic issues?
- Concentrate resources?
- Develop a frame of reference?
- Develop better communications?
- Gain control of operations?
- Provide a road map?
- Set more realistic, attainable objectives?
- Because others are doing it?
- Other?

Behavioral Benefits

- Creates a common language for all participants
- Participation increases motivation and morale

Difficulties of formal strategic planning

- Internal resistance
- Expense
- Current crises dominate
- Planning is difficult
- Plans reduce choice
- Imposes new limitations

Influential factors on the planning process

- Preparation of the participants
- Formality/informality of the company
- Management style; role of the chief executive
- Small vs. large organization
- Centralized vs. decentralized functions
- Nature of existing relationships among functions
- Nature of problems facing you

Strategic planning techniques

- Include people who are paying attention to different things and represent a variety of perspectives on the issues
- Get out agendas early
- Provide concepts for people to test

- Raise awareness about issues which will enable people to better express their beliefs and motivations
- Get quality information: test indifference
- Feedback discussion to ensure common understanding and get buy-in in phases

The Strategic Planning Process

EX: The Worldwide University Community

The Vision

- Mission statement
- Keeper of the vision

The Audit

- Provides a basis for the strategic planning process
- Identifies and analyzes key trends, forces and phenomena
- Forum for sharing and debating divergent views
- Sharpens vague opinions
- Stimulates creative thinking

Assess the current situation

- Issues (strengths, weaknesses, opportunities and threats)
- Constituents and segments
- Current program
- Resources
- Setting/ environment (economic, demographic, social, political, technological, legal)

General areas to address

- Constituents: who do we serve? who should we serve? how do they see us? what is their opinion of us?
- Information: on the outside world? about the institution at large? take action on this information? require more information?
- Products and services: what? which are distinctive/new/fading/in development? how are they valued? how do we measure success?
- Fees: how set? when last reviewed? compare competitively?
- Facilities: adequate? what else is available? equipment?
- Finance: source and use of funds, what risks are we exposed to? what controls should we have?
- Decision-making: what decisions are critical? who makes...on what basis?
- People: present staff – skills, potential, turnover assessment
- Dangers: how would we handle substantial changes in any of the above?

The Plan

Objectives (mission statement/vision made more concrete)

- Long- and medium- term plans
- First year detailed plans

- Define how they fulfill mission and where they are lacking
- Information base and analysis: background, data on current situation and projected situation, “what is” summary
- Financial summary: analysis of cost, possible income, etc. (broad strokes)
- Contingency plans: possible alternative events, including what you may have rejected

Techniques for developing objectives

- Base on past performance
- Trends adjusted for future forces
- Industry trends
- Resource utilization
- Negotiation
- Dictated from top
- Outsourced innovation

The art of developing strategies

- Strategy comes first. Tactics implement strategies
- An art
- Dependent on quantitative and *qualitative* analysis
- Return to audit and ask how your strategies fit
- Successful strategies are clusters of interrelated strategies

Tactics: Applying strategic plans to current decisions

- How resources are deployed
- Plans: concrete, forward-looking
- Budgets: guides to action; document of control; zero based budgeting
- Development: in house, or partner requirements
- Linkage with offline tactics

Leadership strategies for the future

- Knowing how to extract value from information – important in era of info overload
- Developing new models of convergence – initiate cross departmental efforts
- Redefining role from gatekeeper to gateway – increases number of active stakeholders
- Developing ways to collaborate – identify and use savvy constituents
- Flexibility – keep in touch with what’s happening in online world
- Innovative exploration of how intersection of disciplines will define the new face of constituent relations

Characteristics of a strong online presence

- Preserves, protects and takes advantage of unique assets
- Creates a worldwide college community
- Provides a collaborative relationship with institution
- Leverages institutional resources

- Integrates systems across campus
- Streamlines administrative functions
- Recognizes important role of largest constituent base
- Balances current needs with necessity for growth and is developed [internally or externally] accordingly