

# BMI Year 4

## Case Study Work and Teams

- In teams, you will complete work assignments and report out at last session.
  - SWOT analysis
  - Strategy map (mission, vision, values, strategic goals)
  - Activity Scope related to one strategic goal
  - Metrics (limited)
  - Presentation

# Organizational Support For Strategic Planning

## Instructions

This instrument will help you and your fellow participants examine the strength of support in your organization for effective strategic planning. Sixteen conditions which foster effective strategic planning are listed below. Consider to what extent each condition is present in your organization and state your feelings by circling the number that best corresponds to your opinion. Add all of the circled numbers and write the total in the box provided.

	Not Very Present	Some-what Present	Mostly Present	Almost Completely present
1. Clarity of responsibilities between operation units	0	1	2	3
2. Successful history with planning and implementation	0	1	2	3
3. Prior skills in planning	0	1	2	3
4. Effective communication and feedback systems	0	1	2	3
5. Rewards for long-term thinking and action	0	1	2	3
6. Available information on the organization's business activities	0	2	4	6
7. Available information on the organization's business environment	0	2	4	6
8. Sufficient time and attention given to planning tasks	0	2	4	6
9. Good relations between segments of the organization	0	2	4	6
10. Desire among managers to do strategic planning	0	2	4	6
11. Financial and political stability	0	3	6	9
12. Willingness to take calculated risks	0	3	6	9
13. Demonstrated creativity	0	3	6	9
14. Demonstrated flexibility and adaptiveness to change	0	3	6	9
15. Skill at group process and interpersonal relations	0	3	6	9
16. Commitment of the senior leader to planning	0	3	7	10

Total Score (100 possible)

# Strategy Map Template

<b>Mission</b>	<b>Vision</b>	<b>Values</b>
<b>Customer/Mission Focused</b>		
<b>Internal Processes (operational excellence)</b>		
<b>Resources (financial)</b>	<b>Organizational Capacity (learning)</b>	

# Activity Scope Template

_____ – Activity Scope		Date: _____
<b>Background / Problem Statement</b>	<b>Strategy It Aligns With</b>	
<div style="border: 1px solid black; height: 80px;"></div>	<div style="border: 1px solid black; height: 50px;"></div>	
<b>Mission of the Activity</b>	<b>What Measures Will You Use: baseline, progress, outcomes</b>	
<div style="border: 1px solid black; height: 90px;"></div>	<div style="border: 1px solid black; height: 100px;"></div>	
<b>Specific Goals / Objectives</b>	<b>Sponsor / Owner</b>	
<div style="border: 1px solid black; height: 150px;"></div>	<div style="border: 1px solid black; height: 40px;"></div>	
<b>Resource Needs</b>	<b>Project Leader / Manager</b>	
<div style="border: 1px solid black; height: 90px;"></div>	<div style="border: 1px solid black; height: 40px;"></div>	
<b>Timeline</b>	<b>Facilitator (if there is one)</b>	
<div style="border: 1px solid black; height: 60px;"></div>	<div style="border: 1px solid black; height: 40px;"></div>	
	<b>Team Members</b>	
	<div style="border: 1px solid black; height: 150px;"></div>	

# Metrics Template

**Strategic Goal it Aligns With:**\_\_\_\_\_

**Measurement Intent:**\_\_\_\_\_

**Measurement Definition/Formula:**\_\_\_\_\_

\_\_\_\_\_

**Target:**\_\_\_\_\_

**Tracking/Reporting Responsibility:**\_\_\_\_\_

**Frequency of Update:**\_\_\_\_\_

**Data Elements and Sources of Data** \_\_\_\_\_

**Who writes Analysis:**\_\_\_\_\_

**Who sets the Targets?**\_\_\_\_\_

