

GETTING READY FOR SOAP ...

We've just compiled, considered, and reflected on a ream of data—strategies, customers, programs, best practices, reflections, action plans— now it's time to distill it all on a single 11"×17" sheet ... a **Strategy On A Page** (SOAP)!

Below is the SOAP framework in overview form, keyed to Section & Sub-Section Names.

On the facing page are some ways of thinking about each of these sections. This is a "View from 50,000 Feet" sort of thinking—there will be plenty of opportunity for details in the pages to come, but here we're more concerned with the broad flow ... how all these concepts fit together and drive the overall strategy.

Get a feel for the form, then put on your thinking cap and jot down **just 5 words or phrases** that describe the critical components of each section. When you get done, you'll have 65 words that define your *strategic approach* and *direction*, from kick-off to touchdown and on to the Super Bowl—your Visionary Dream and Big, Hairy, Audacious Goal!

STRATEGIC PLAN		OPERATING PLAN																																																																									
Mission & Core Values	Strategies & Tactics	Mission Milestones	Outcome Flags	Big Actions	Work Plan																																																																						
<p style="text-align: center; font-size: 2em; font-weight: bold;">①</p> <p style="text-align: center; font-size: 0.8em;">STRATEGY THEME</p> <hr/> <p style="text-align: center; font-size: 2em; font-weight: bold;">②</p> <p style="text-align: center; font-size: 0.8em;">Opportunities to exceed Plan:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> </table> <hr/> <p style="text-align: center; font-size: 2em; font-weight: bold;">③</p> <p style="text-align: center; font-size: 0.8em;">Threats to achieving Plan:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> </table>	1.		2.		3.		4.		5.		1.		2.		3.		4.		5.		<p style="text-align: center; font-size: 2em; font-weight: bold;">④</p> <p style="text-align: center; font-size: 0.8em;">OUR MISSION:</p> <hr/> <p style="text-align: center; font-size: 0.8em;">OUR CORE VALUES:</p> <hr/> <p style="text-align: center; font-size: 2em; font-weight: bold;">⑤</p> <p style="text-align: center; font-size: 0.8em;">KEY STRATEGIES <i>Defining an our Core Purpose</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> </table> <p style="text-align: center; font-size: 0.8em;">QUALITY STATEMENT: <i>What we do best</i></p> <hr/> <p style="text-align: center; font-size: 0.8em;">BUSINESS MODEL:</p> <hr/>	1.		2.		3.		4.		5.		<p style="text-align: center; font-size: 2em; font-weight: bold;">⑥</p> <p style="text-align: center; font-size: 0.8em;">KEY FINANCIAL METRICS <i>Our 3-5 Year Priorities</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> </table> <p style="text-align: center; font-size: 0.8em;">3-5 YEAR TARGETS:</p> <p>Future Date: _____</p> <p>Revenues: \$ _____</p> <p>Funding: \$ _____</p> <p>Surplus: \$ _____</p> <p>Occupancy: _____</p> <p>Total No. of Clients: _____</p> <p>Our Sandbox (Region): _____</p> <p style="text-align: center; font-size: 2em; font-weight: bold;">⑦</p> <p style="text-align: center; font-size: 0.8em;">SMART NUMBERS: <i>Key Long-Term Metrics and Targets</i></p>	1.		2.		3.		4.		5.		<p style="text-align: center; font-size: 2em; font-weight: bold;">⑧</p> <p style="text-align: center; font-size: 0.8em;">NON-FINANCIAL SMART NUMBERS</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> </table> <p style="text-align: center; font-size: 0.8em;">*Stretch* FINANCIAL TARGETS:</p> <p>Future Date: _____</p> <p>Revenues: \$ _____</p> <p>Funding: \$ _____</p> <p>Surplus: \$ _____</p> <p>Occupancy: _____</p> <p>No. of Clients: _____</p> <p>Cash Reserves: _____</p> <p>A/R Days: _____</p> <p style="text-align: center; font-size: 2em; font-weight: bold;">⑨</p> <p style="text-align: center; font-size: 0.8em;">VISIONARY DREAM and B.H.A.G.:</p>	1.		2.		3.		4.		5.		<p style="text-align: center; font-size: 2em; font-weight: bold;">⑩</p> <p style="text-align: center; font-size: 0.8em;">KEY "ROCKS" <i>Our Priorities</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> </table>	1.		2.		3.		4.		5.		<p style="text-align: center; font-size: 2em; font-weight: bold;">⑪</p> <p style="text-align: center; font-size: 0.8em;">KEY "ROCKS" ACTION STEPS</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 20px;">1.</td><td></td></tr> <tr><td>2.</td><td></td></tr> <tr><td>3.</td><td></td></tr> <tr><td>4.</td><td></td></tr> <tr><td>5.</td><td></td></tr> </table> <p style="text-align: center; font-size: 0.8em;">Reward or Celebration:</p>	1.		2.		3.		4.		5.	
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① Strategy Theme

② Opportunities

③ Threats

④ Mission & Core Values

Organization Mission

Core Values

Company Culture

Vision Statement

⑤ Strategies & Tactics

Key Strategies

Quality Statement

Business Model

⑥ Mission Milestones

⑦ 3-5 Year Targets

Financial Smart Numbers

⑧ Outcome Flags

Non-Financial Smart Numbers

⑨ Stretch Financial Targets

⑩ Big Actions

⑪ Work Plan

⑫ Reward or Celebration

⑬ Visionary Dream & B.H.A.G

How To **THINK** About SOAP ...

① What's our Call To Action?
Our Rallying Cry?

Our **THEME** for the Whole Campaign?
(NIC example:) **GROW THE PARK!**

② What MIGHT happen to help us Succeed and Exceed?

③ What MIGHT happen to make us Fall Short of our Plan?

④ Why does our organization Exist?
Who will we Serve?

What do we Do?
What do we Stand For?

What do we Believe?
How do we Conduct ourselves?

What is our organization's Culture?
What is our Brand Promise?

What Type of organization are we building?

⑤ What are our Business Activities?
What Results do we Expect?

How will we Achieve them?
What do our Customers have a Right to receive?

What is our Value Proposition?

⑥ Where are we Headed?
How do we create a Shared Identity that Connects all our Stakeholders and Inspires them?

What Key financial metrics should we Track?

⑦ In 3-5 years, where do we want to be in Revenue, Funding, Cash, Occupancy, and Clients?

⑧ What is CRITICAL to Success and How do we Measure it?

⑨ What Results can we achieve if we really **STRETCH** ourselves over the next 12 months?

⑪ Who is going to be **RESPONSIBLE** for getting everything done?

⑫ How do we **REWARD** Hard Work?

⑩ How are we going to Implement our Initiatives?
What defines our Business Model?

What must we do **NOW** to achieve results?

⑬ If we Succeed beyond our Wildest Visionary Dreams, what **BIG, HAIRY, AUDACIOUS GOAL** can we achieve?

EXAMPLE

Word/Phrase #1	Word/Phrase #2	Word/Phrase #3	Word/Phrase #4	Word/Phrase #5
knowledge worker	grow our own	live, work, learn, lead	creative class	growth-minded

①	_____	_____	_____	_____
②	_____	_____	_____	_____
③	_____	_____	_____	_____
④	_____	_____	_____	_____
⑤	_____	_____	_____	_____
⑥	_____	_____	_____	_____
⑦	_____	_____	_____	_____
⑧	_____	_____	_____	_____
⑨	_____	_____	_____	_____
⑩	_____	_____	_____	_____
⑪	_____	_____	_____	_____
⑫	_____	_____	_____	_____
⑬	_____	_____	_____	_____