



PLANNING FOR SUCCESS

**Advance Planning SWOT Process to Choose
& Prioritize Options and NEXT STEPS**



Planning in 2020 for actions in 2021 or 2022.

▶ BY APRIL - MAY 2020 -

Program Committee will share a
MENU OF ACTION OPTIONS
that Issue Committees have created.



Planning in 2020 for actions in 2021 or 2022.

▶ APRIL – JUNE 2020 –

Members & Branches can use this time to **discern and prioritize one to three of the ACTION OPTIONS** they might launch locally between 2020 and 2022.

▶ MAY – SEPT 2020 --

Members & Branches will plan **NEXT STEPS** for the project(s) they choose to undertake.



Planning Ahead by 18-24 months adds capacity and resilience.

- For **AT-LARGE MEMBERS** who want to launch a local action for WILPF.
- For **NEW BRANCHES** trying to plan for visibility and action.
- For **RELAUNCHED BRANCHES** working to capture attention and members
- For **EXISTING BRANCHES** refreshing their local image and rethinking the way forward.



SWOT ANALYSIS

- **S**TRENGTHS
- **W**EAKNESSES
- **O**PPORTUNITIES
- **T**HREATS

How you decide from many options
which is the best path forward.



STRENGTHS & WEAKNESSES

- ▶ **Internal to your situation, your community or your branch.**
- ▶ **Things you have control over and can change.**



OPPORTUNITIES & THREATS

- ▶ **External –**
outside your control...
arising from your community...
- ▶ You can TAKE ADVANTAGE OF OPPORTUNITIES
- ▶ You can PROTECT AGAINST THREATS
- ▶ You can't change these factors.



SWOT ANALYSIS

- **S**TRENGTHS
- **W**EAKNESSES
- **O**PPORTUNITIES
- **T**HREATS

How you decide from many options
which is the best path forward.




A SWOT ANALYSIS GRID



You may be surprised by the results.

- ▶ **SWOT Analysis, done correctly, forces you to look in new ways at**
 - ▶ Your challenges and opportunities.
 - ▶ Your community and Allies

**You might see your situation from a fresh
and unexpected perspective.**



WHO needs to be part of a SWOT analysis?

- **LEADERS** of your branch or your planned project.
- **STAKEHOLDERS** – members or potential members.
Combine experienced and newer members/activists.
A diverse cross-section of your group.
- **LOCAL ALLIES** in the community.



Why include “Outsiders”?

ALLIES add newer perspectives

- ▶ Can identify **challenges** invisible to you.
 - Conflicting dates
 - Opposition to your theme,
 - Reinventing the wheel -- other organizations already planning something similar.
- ▶ Can suggest new **opportunities** you may have overlooked.



SWOT ANALYSIS

for planning **actions or strategies**...

- For **AT-LARGE MEMBERS** who want to launch a local action for WILPF.
- For **NEW BRANCHES** trying to plan for visibility and action.
- For **RELAUNCHED BRANCHES** working to capture attention and members
- For **EXISTING BRANCHES** refreshing their local image and rethinking the way forward.



Preparing for a planning process & SWOT Analysis.

- Decide on the stakeholders, leaders, allies, members you want to participate.
- Should not take more than a couple hours
- Might be part of a longer Planning Retreat
- A comfortable place with tables to write on
- A WALL space to display the SWOT GRID
- Maybe plan refreshments to encourage people to interact.



Choose a Facilitator

- Does not need to be a WILPF member.
- Experienced at facilitating group process
- Someone trustworthy – keeps info confidential.
- Choose a **NOTE-TAKER**. Someone with good clear handwriting. Use large planning sheets.

**If you choose an OUTSIDE facilitator
it frees ALL your members to participate in the
envisioning work of the process.**



Post “Ground Rules”

- All ideas are good ideas.
- Critique the idea, not the person proposing the idea.
- To SPEAK, raise your hand to get on a stack.
- The facilitator will call on EVERYONE to speak, encouraging the reticent.
- If you’ve already spoken a lot, let someone else have a chance.
- Seek consensus. If a position is stated, check on how much agreement there is.



START WITH A CENTERING ACTIVITY

- **Announce your intentions** for the planning session.
- **Explain the process structure** and timeline for the day.
- **Time to Consider** -- Give participants 10 – 15 minutes of quiet to work separately recording their own suggestions of **STRENGTHS**, **WEAKNESSES**, **OPPORTUNITIES** and **THREATS**.
- Have them **record their ideas on POST-IT NOTE** pages.
- When the facilitator calls “TIME” have everyone **stick their notes in the SWOT Grid...** in the sections where they belong.
- **Eliminate duplicates.** Observe the visual that’s left.
- **Read aloud** all the remaining sticky note ideas.



Prioritiizing the SWOTs

- **Distribute 5-10 sticky DOTS** in 4 colors... to each participant.
- Each color represents each S-W-O-T.
- Participants add their DOTS to the suggestions they believe are **the most important considerations**.
- Based on the number of dots on each idea, you have **a prioritized list** of which SWOTs are **the most important to address**.
- **Step back and DISCUSS** the priorities you've identified. Allow everyone present to speak....
- **Make any tweaks** to the list of priorities based on consensus.



AFTER REFRESHMENTS & SOCIAL TIME

- ▶ **Thank your OUTSIDE ALLIES** for their participation. They are free to leave.
- ▶ **Now it's time for your leaders and members to hunker down** and review the information you were given.
- ▶ **Any surprises?** Any new information? Any conflicts you didn't anticipate? What kinds of **new opportunities** have you discovered?



DIALOGUE & ENVISIONING

- **Continue to review the SWOT information.**
- Honestly evaluate not only what you learned but how you feel about what you learned.
- Going forward, what can you do to maximize opportunities?
- How can you minimize internal weaknesses?
- How can you use opportunities to reduce outside threats?



Phase 2 – Leadership Analysis

- Evaluate the process so far.
- What excited you? What scared you? What new ideas do you have? What did you learn?
- What might be your next steps?
- Who will do what? Make assignments and commitments.
- When can you meet again to finish this process?
- Be sure someone takes the notes to record them, and saves a photo of the SWOT Grid materials.



INTENTIONS & PRIORITY SETTING

- ▶ Intentionally recall the goals and purpose of this exercise.
- ▶ Look at your **Strengths and Opportunities** for each **ACTION** you want to plan or goal you want to set for the future..
How can you maximize these?
- ▶ Look at your **Weaknesses and Threats**
How can you convert these to opportunities?



CONVERT ANALYSIS TO STRATEGY

- ▶ Use your SWOT Analysis to produce a **list of PRIORITIES you want to address** to get to your goals.
- ▶ Working backwards from where you want to be, **identify specific ACTIONS** to get to your goal...



FROM GOALS TO REALITY

- ▶ Place your proposed **ACTIONS** onto your **PLANNING CALENDAR** for the next 18-24 months.
- ▶ **Work backwards** from the goals you want to achieve and build in resilient practical **NEXT STEPS** for achieving them.



GET YOUR “DUCKS” IN LINE.

- **BE AS DETAILED AS YOU CAN.** You can always tweak your plan.
- **PLANNING FARTHER OUT** gives you more flexibility and lets you include more layers of planning.
- **BUT DON'T WAIT till the end** to start working.
- **INCLUDE DETAILS IN YOUR TIMELINE AND BUDGET --** Include calls with allies, deadlines for printing, firming up any expenses, and meetings to recruit short or long term volunteers to help.



GAINING BUY IN

- Once your plan is clear, **bring it to your membership.**
- **ADD CREDIBILITY** – have members with long term credibility who agree with your proposal help present it.
- **Be positive** about WHY you are making these suggestions.
- **Be transparent** about how the planning process evolved.
- **Ask for BUY-IN and commitment** to fill the roles you've identified that you need.



OVERCOMING OBJECTIONS – Don't Give Up

- ▶ How can you tweak your plan to overcome objections?
- ▶ **START AGAIN** to look at SWOT data you collected.
- ▶ Look for ways to **enlarge the circle** and include more volunteers, more hands.
- ▶ **Invite outsiders to help** organize an ACTION or EVENT even if they are not members of WILPF.
- ▶ **EVEN IF YOU FAIL TO GET FINAL BUY-IN**, you will have introduced the concept of advance planning for a goal or event or action.



THE PROCESS

- What are you deciding on? What are you planning?
- Gather a broad and diverse group to participate in the SWOT process.
- Give everyone POST-IT-NOTES & time to write down Strengths, Weaknesses, Opportunities and Threats
- Have them place their SWOTS on the grid and to visualize your situation.
- Read the SWOT suggestions aloud and remove duplicates.



THE PROCESS

- NOTICE where the energy is in each quadrant.
- RANK the POST-ITS with the highest priority by voting with color dots.
- DISCUSS your chosen priorities...
- CELEBRATE with Refreshments.
- Thanks and excuse your participating outside allies.




THE PROCESS

- ▶ LEADERS regroup to **analyze results**.
- ▶ LEADERS meet to **develop priorities**.
- ▶ LEADERS **develop NEXT STEPS** towards choosing **ACTIONS** or long term **STRATEGIES** for Growth.
- ▶ LEADERS **place ACTIONS** on a **CALENDAR** over the next 24 months, creating a project **TIMELINE**.



THE PROCESS

- ▶ LEADERS **develop a BUDGET** to anticipate possible expenses.
- ▶ LEADERS **develop a HUMAN BUDGET** to determine what roles they need.
- ▶ LEADERS **present their plan** to full membership for approval and buy-in.
- ▶ TOGETHER the members/activists **tweak the plan** till they can agree.



See why you need 24 months to plan for success?

- ▶ You'll have **time to seek funds** if you plan for expenses.
- ▶ You'll have **time to recruit** short term commitment from helpers.
- ▶ You'll have **time to book the best location.**
- ▶ You'll have **time to build community support** for your project.
- ▶ You'll have **time to add arts, drama, music** – that can attract a diverse audience.
- ▶ You'll have **time to evaluate your goals** AND if you met those goals.



Up-er Crust Pies -- EXAMPLE

- ▶ **NEEDS** a plan to successfully open their downtown location in “Upbetchatown USA”.
- ▶ **Goals** are to bring in new customers and expand quickly.
- ▶ They’re SWOT DETAILS look different but **their process is the same.**

S Strengths

Location: Our first location downtown will draw in visitors and downtown shoppers.

Uniqueness: We stand out as a unique alternative to fast food and we offer consistently high-quality food in a distinctive atmosphere.

Strong management: We have assembled a team that embraces different disciplines with expertise in all areas of the business.

W Weaknesses

Lack of capital: All startup funds will come from loans and investors.

Lack of reputation: We haven't established ourselves as reputable meat pie provider yet.

O Opportunities

Area growth: Yubtchatown is growing by 8.5% annually.

Working families with children: This is a growing population, both in numbers and in their choice of convenient foods. Two-income families have less time to prepare a meal.

T Threats

Competition: One competitor sells similar pies, and has loyal customers as well as a relationship with businesses that regularly buy from them.

Being unprepared for opening numbers: Initial poor service or product quality could discourage customers from returning.



Translate the PLAN concept...

UP-er Crust Pies > WILPF

- Investigate Investors > **Approach local Opinion Leaders.** Ask them for their help short term, or long term.
- Identify your “Market” > **Younger more mobile women? Newly retired women?** Where would you find them?
- Opportunities: The town is growing >
The town is ready to solve major problems.
- Opportunities: A grand opening > **An introductory SOCIAL event to introduce WILPF and your upcoming goals.**



SUSPEND DISBELIEF...

Put your “BUTS” aside.

Most objections are about INTERNAL WEAKNESSES:

- Lack of capacity
- Lack of energy
- Lack of vision

➤ **THE OPPORTUNITIES ARE OUT THERE....**

SOME organization is going to take advantage of them. **Why not WILPF?**