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

- STRENGTHS
- WEAKNESSES
- OPPORTUNITIES
- THREATS

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

- **STRENGTHS**
- **WEAKNESSES**
- **OPPORTUNITIES**
- **THREATS**

How you decide from many options which is the best path forward.
A SWOT ANALYSIS GRID

S | Strength #1
   | Strength #2
   | Strength #3
O | Opportunity #1
   | Opportunity #2
   | Opportunity #3
W | Weakness #1
   | Weakness #2
   | Weakness #3
T | Threat #1
   | Threat #2
   | Threat #3
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.
Prioritizing 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.

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**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.

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**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.

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**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?