Formula for Transforming Your Chapter: Strategic Planning + ALC Learning + Continuous Improvement Practices

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President
Hawaii Chapter

Makana Risser Chai
VP of Events
Hawaii Chapter
Business Card Poker

1. Trade cards with 5 people
2. Get to know a little about them
3. Sit at a table with someone you met
4. Keep business cards for post-ALC networking
5. Combine all cards at the table for the best hand
6. Best hand wins prizes for everyone at the table!
E Komo Mai
(Welcome)
Poker Hand Rankings

1. Royal Flush
2. Straight Flush
3. Four of a Kind
4. Full House
5. Flush
6. Straight
7. Three of a Kind
8. Two Pair
9. One Pair
10. High Card
Survey + Observation + Strategic Opportunity

Business Card Poker – Why?

Want to Meet People

 почему
The Big Idea

You can change your chapter’s current reality if you implement a **strategic plan**!
Learning Objectives

Apply a practical framework for your strategic planning

Adopt a "continuous improvement" mindset to transform your chapter

Identify best practices at this ALC to take back to your chapter
Before Condition - Cause

Lack of Strategy!
Before Condition - Effects

- Last-Minute Event Planning
- Attendance
- Membership Lapsing
- Hard to Get Board Members
- What is “Success”?!?
- Board Burn Out
Pre-ALC Planning

No Strategy!
WOW Your Members by **Planning an Entire Year** of Programs

Thank you, Bay Colonies!
How to **Reorganize** & **Revitalize** Your Chapter to Achieve Results

Thank you, Central PA!
Engagement Strategies for Membership Retention

Thank you, Metro DC!
Running Your Chapter Like a Business
Thank you, Maryland/NAC!
Chapter Health Dashboards for Dummies

Thank you, Cascadia!
Growing **Strategic** Partnerships: Leveraging Sponsors...

Thank you, Greater Atlanta!
#alcwherehaveyoubeenallmylife
**Strategic Planning: Practical Framework**

**CORE IDEOLOGY**

**Core Values: What are our deepest ingrained principles that guide all of our behaviors and actions?**
- Lifelong Learning & Self Development: We believe in ongoing growth to better ourselves personally and professionally.
- Power of Community & Relationships: We believe we can learn more and achieve more through collaboration.
- Spirit of Continuous Improvement: We believe in continuously enhancing the experience of and increasing our value for our members.
- Global: We learn, minimize, prioritize, improve, influence positive change in the organization and in life.

**SWOT ANALYSIS**

**Strengths: How to leverage our strengths?**
1) Passionate, dedicated board
2) Strong national brand/reputation
3) Monthly, well received events
4) Loyal, core membership
5) Financially stable
6) ATD national support

**Weaknesses: How to reduce weaknesses?**
1) Board stability
2) Lack of strategic programs, causing: - Delayed projects - High non-attendance - Poor quality of content - Lack of feedback from program participants, other new task force
3) Lack of focus on back-end and front-end processes, other new task force

**Opportunities: How to take advantage of opportunities?**
1) Take advantage of existing resources
2) Develop new programs and delivery type to improve the value we deliver for our members
3) Strategic partnerships with local community to create a win-win situation
4) Market creatively for improved reach
5) Design purposeful and engaging volunteering opportunities for our members
6) Increase opportunities for networking and developing relationships
7) Provide program content that mindfully balances global insights, local culture/context, and Hawai’i values.

**Threats: How to defend against threats?**
1) Board health: morale, dynamics, burnout
2) Board succession
3) Other similar, competing organizations
4) Member’s lack of time to come to events
5) Other learning avenues

**KEY FOCUS AREAS (Next 2 years)**

Decided on focus for the next 2 years

**INITIATIVES (2018)**

Generated 2018 Initiatives

**PRIORITIZED OBJECTIVES (Quarterly)**

Generated Q1 Priority Objectives

<table>
<thead>
<tr>
<th>Category</th>
<th>Priority Q1 Objective #1</th>
<th>Lead</th>
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<tbody>
<tr>
<td>Field Trip</td>
<td>Program</td>
<td>Val</td>
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<td>Behind-the-Wheel</td>
<td>as a board</td>
<td>Makana</td>
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<tr>
<td>Coffee Meetup</td>
<td>Program</td>
<td>Melissa</td>
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</table>

**Priorities**

- Define “mutually beneficial” (what kind of partnership is this?)
- Identify company priorities and define how these objectives will bring value to your cause?

**Leads**

- Research
  - Lead: Lou
  - Define what’s needed
- Lead: Tanya
What We Did: SWOT Analysis

Source: Looman Coaching
Activity: Your SWOT Analysis

STRENGTHS:
Come up with Weaknesses & Opportunities with your chapter group or others

WEAKNESSES:

OPPORTUNITIES:

THREATS:
### Strategic Connection: SWOT → 2-Year Focus

**SWOT**

**STRENGTHS**
How to maximize?

**WEAKNESSES**
How to reduce?

**OPPORTUNITIES**
How to take advantage?

**THREATS**
How to mitigate?

### Key Focus Areas (Next 2 years)

**Purpose:** Why is this work important?
- Organization Purpose
- Individual Role Purpose

**Mission:** Why do we exist?

**Vision:** What would it look like if we were to achieve our Mission?
Continuous Improvement (CI) Mindset: PDCA Cycle

Plan

Do

Check

Act

Enhance member value & experience
PDCA - Kano Model

- Analyzes **customer requirements**
- Categorizes each requirement’s **level of satisfaction**
- Helps to truly **delight your customers**
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<th>House (2018)</th>
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<td>Variable</td>
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<td>Code</td>
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<td>House alarm</td>
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<td>creates a “WOW!”</td>
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<td>AI installed</td>
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<tr>
<td></td>
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<td>Ocean view</td>
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PDCA - Kano Model Activity

**EXPECTED**
- Hassle-free registration
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**SATISFIERS**
- Useful learning as advertised
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- 
- 

**DELIGHTERS**
- Meaningful professional connection
- 
- 
- 
- 
- 
PDCA: Execute the Event

Importance of methodical observation
PDCA - Start-Stop-Continue-Improve

- **START**: What do you want to start doing?
- **STOP**: What do you want to stop doing?
- **CONTINUE**: What do you want to continue doing?
- **IMPROVE**: What do you want to improve?
PDCA - Use Kano / SSCI Together
PDC\textcolor{red}{A} - Now, Make it Actionable!

**Prioritize**

**Actions**

<table>
<thead>
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<th>Task</th>
<th>Responsible</th>
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<tr>
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ATD Hawaii
2018 Journey
Activity: ALC 2018 Planning

Which sessions will you go to?

Your SWOT

ALC 2018
RECAP: Formula for Success =

**Practical framework** for your strategic planning

“Continuous improvement" mindset to transform your chapter

Best practices at this ALC to take back to your chapter
Let’s Keep in Touch!

Mahalo
(Thank you)

Ai

Makana