

Strategic Planning

At its foundation, a strategic plan should be a guidebook that defines where the organization is now, where it wants to be in the future, and how it will get there. Yet most strategic plans quickly move to an aspirational discussion of hopes and dreams and end with a lengthy list of tasks. That is why so many strategic plans end up on the bookshelf!

Our Strategic Planning takes a four-step approach to create an environment for tough conversations, structured implementation, and ongoing accountability. By the end of our work, your organization will have a detailed plan to keep you focused on your destination throughout your journey. You will also gain the skills and processes needed to change your route if (when) a detour unexpectedly pops up along the way.

"We found the experience of working with J.L. to be both productive and challenging. Calmly but firmly, he encouraged us to question some of our assumptions and most of our practices. By doing so, we were able to make sales advances we had long desired. J.L. deftly combines a thorough understanding of data with years of field experience and an awareness of best practices from across the country."

Mark Fields
Executive Director
The Grand Opera House

Key Components

- ◆ Qualitative and quantitative assessments of your organization
- ◆ Board determines the goals and strategies; staff develops the tactics
- ◆ A built-in accountability system to keep the plan front-and-center

Organizations That Will Benefit

- ◆ Organizations that have had difficulty completing everything outlined in past strategic plans
- ◆ Organizations that have a history of strong starts, but soon the plan fades into the background

"I have always been impressed with how tirelessly he works to help artists achieve their goals. Most of all, it is his unflappable nature that sets him apart. No problem is too big. No conversation is too complicated. Everything he does is approached with calm stability that sets everyone at ease and makes them ready to meet opportunities head-on."

Matthew Phelps
Artistic Director
Vocal Arts Nashville



Connect with Nave Strategies to Achieve Your Goals !

Our Road Map

Phase 1: Assessment

Before a destination is set, you need to know where you are. Tailored to the needs of the organization, we will:

- ◆ Assess your organization's activities and results over the past five years as an objective, data-based tool to identify strengths and opportunities
- ◆ Understand how each component (board, artists, staff, volunteers) relates to your organization as a whole and impacts your organization's work
- ◆ Work with staff to identify individual and collective strengths, and how to maximize those strengths to benefit your organization

Phase 3: Tactics

Once the destination is set by the Board, your professional staff are charged with identifying the path for your journey. In partnership with the staff, we will:

- ◆ Create a written plan that identifies strategies and action steps to be implemented in the first 12 months - including timelines and who will be accountable
- ◆ Implement a financial projection tool as a resource for planning tactics
- ◆ Develop a regular, ongoing process to hold your organization accountable to the plan and adapt the plan to changes in your organization or environment

Phase 2: Goals

Now that our current location is identified, it is the Board's governance duty to identify where the organization should arrive in several years' time.

We will engage with your Board to:

- ◆ Review your existing mission and/or vision statements, or create them if needed
- ◆ Discuss your opportunities, desires, challenges and needs as identified by the qualitative and quantitative analysis
- ◆ Articulate your organization's goals for the next 3-5 years
- ◆ Identify how each component of your organization relates to these goals

Phase 4: Implementation

You do not have to start your journey alone. We will stay with you for three months as an accountability partner, cheerleader, and guide. We will:

- ◆ Remotely attend up to three strategic implementation meetings to assist with questions, work through start-up challenges, and celebrate your successes
- ◆ Provide additional support by phone and email as needed

