TURNING STRATEGY INTO ACTION
TACTICAL PLANNING FOR ASSOCIATIONS
This white paper is for association leaders who want to make sure their strategies turn into real action.
Too often, association strategic plans fall into one of two categories:

- They are high-level documents, used perhaps for communication but otherwise not tied to the ongoing choices made by the association.
- The strategies are turned into precise activities, tracked in cumbersome documents, with no sense of how they add up to the right set of choices made by the association.

It’s terrifically important for associations to get strategies right. But getting them right doesn’t just mean writing them down—it also means getting them done.

And that’s where a strong tactical planning process comes in.

This white paper will outline a process for:

- Connecting high-level strategies to real-world operations through tactics
- Bringing tactics together into a coherent, feasible—but still inspiring—plan
- Using the plan to manage expectations—and make space for opportunities

This is for the big-picture, top-down thinkers, to help you translate your visions into practical realities.

And it’s also for the detail-oriented, bottom-up thinkers, to help you harness those specifics to the broader purpose.
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Strategy on a different scale

Strategy doesn’t end once the board meeting adjourns. Prominent strategy consultant and writer Roger Martin argues that at each level of the organization, each set of decision-makers needs to apply exactly the same kind of thinking and process as they set their strategies. Just because a tactic may not apply to the entire association, that doesn’t mean it doesn’t still demand strategic thinking and logical rigour.

Think of strategies as being enacted through tactics. Tactics can be conceptualized as projects or initiatives—something that an individual might own or manage, albeit usually with lots of input and support. A single tactic might be done within a few months or stretch out for years.

However, tactics aren’t flat activities or programs. Just saying “We will maintain our conference”—that’s not enough. Think about why you even have a conference in the first place. What purpose does it serve? How does it support your strategies? How does it create value? How does it make you successful? How does it need to change?

The strategic mindset of making choices to be successful should pervade the whole tactical planning exercise.

Give the process attention—and leadership

If the strategic planning process has been time-consuming, and especially if it has taken a lot of effort by the CEO or ED to get a good strategy approved by the board, it’s tempting to turn to more pressing concerns.

But tactical planning shows the connection between those pressing concerns and the strategy. It offers a way to triage and prioritize those issues and helps everyone in the organization focus.

Which requires decision-making.

It takes strong and purposeful leadership to make those decisions in a systematic way, and that rests primarily with the CEO.
or ED. Which initiatives will happen—and which won’t? What will get budget—and what won’t? The CEO or ED is crucial to the success of this process overall and to the quality of the final result.

Don’t forget to attach resources to the process itself at different levels of the association, both for plan creation and for pure project management. It’s easy for this to feel like everyone’s job—and nobody’s job. Senior leadership needs to make sure the right conversations are happening, even if they’re difficult, to get to a complete and robust tactical plan.

Give the process some time (but not too much)

How long is the time between the strategy-setting discussion and the completion of a comprehensive plan? Creating the plan should take some time. It’s an iterative, sometimes messy process with a tendency to expose all the fault lines in an organization.

This process is a big project for staff and/or volunteers. It needs to be fitted into the rest of their work, and they need time for reflection and calibration. Rushing typically creates significant stress, lower-quality output, and less commitment to the end result.

That said, usually there is some momentum from the strategy-setting process, and there is probably some eagerness to see the upshot. Most organizations take several months to generate ideas, pull them together into an overall plan, and then revise and refine. More than six months may be too long; less than three months is probably too short.

Consider who to involve

This is about translating ideas into execution, so you want the people around the table to be collectively knowledgeable but also able to grapple with big concepts; sometimes that means both junior staff and decision-makers such as board members. This is a great opportunity to orient everyone in the organization about the strategic directions—so let’s use it.

Look to your current organizational structure. Who gets things done? Who actually executes your work? Those are the people whose perspective will be the most valuable as you work through what the strategies mean for your current and future operations.

If most of the work is staff-driven, that’s where to begin. You may focus on senior staff and let them bring ideas back to their teams for discussion. You may start with an all-staff session to generate ideas, which then get refined by senior staff. You may start with senior staff to frame the conversation and then have the larger staff group meet to discuss implications.

The right answer will depend on your staff culture and model. This can be a great opportunity to get staff engaged with the strategies and help them work across organizational silos.

Volunteers may be involved in generating and evaluating ideas, especially if they are heavily involved in execution. It may also be useful to have some volunteers engaged in the process, playing a governance and consultation role (e.g., as members of a strategic planning task force).
DO YOU NEED HELP WITH THIS?

Strategic and tactical planning is an expensive undertaking, whether measured in terms of cash (to hold meetings or conduct research) or time (for staff and volunteers). But doing it badly is even more expensive because of the missed opportunity to focus the organization’s resources on the right things to move the strategy forward (and avoid investments that don’t).

Investing in consulting support can pay enormous dividends:

- **Driving the process.** Someone whose only role is to make sure the tactical plan is completed can be very helpful, as the CEO or ED is pulled in so many directions.

- **Pushing the conversation.** It’s simply easier to ask hard questions and raise difficult topics coming in from outside the organization. The quality of the output improves as a result.

- **Bringing unparalleled knowledge.** An organization does not do this kind of process annually—nor should it. So the average CEO or ED doesn’t do this all that often. But a busy consultant does it many times every year with all kinds of organizations, so they bring a broader understanding of the issues and a deep experience with the process.

The value to the organization and the experience for the leadership can be greatly increased by engaging the right kind of expertise.
2 WHAT COULD YOU DO?

So you’ve had the strategy-setting session with the board, and you have a set of strategies and a reinvigorated sense of mission and purpose. You’ve thought about how to manage the process and who to involve. Now what?

Put some ideas onto a blank page

Start with an idea-generation phase. To help structure the discussion, you can ask: for each strategy, what tactics will help you achieve it?

Initially, work from a blank page. The idea here is not to start with a list of existing operations and simply attach everything to a given strategy. It’s not a matching exercise.

Starting with what you currently do is a recipe for mediocrity. The blank-page approach can be tough, especially for staff or volunteers who are attached to specific programs, but it’s important to let go of current realities, at least temporarily. Instead, start with the strategies and generate ideas about how that strategy could be achieved successfully.

Don’t worry yet about whether or not that’s what you’re already doing; nor should you be overly concerned with the resources to get this all done just yet.

Not what will you do, but what could you do? Aim for the right answers for the strategies you’re pursuing.

(An off-site location, if feasible, is a better place to ask people to do this than a meeting in the office.)
Think strategically about your tactics

As you articulate the tactics, apply strategic logic to them; this means they should crystallize the choices you will make to be successful.

“Maintain our educational program” may be a proposed tactic. But that doesn't tell us anything about what kind of program is offered. Is it an in-person annual conference? Or is it a broad portfolio of on-demand and virtual programs accessible on an anywhere/anytime basis? Is it premier or basic information? How cutting-edge is your content?

If you are bland or trying to be all things to all people, that's not strategic, and it's a good way to fail at most of what you are attempting.

Note that tactics also may not necessarily map cleanly to a given organizational silo or program. If you are continuing to think strategically, think about the impact on the organization. It may be that a given activity maps to multiple tactics.

For example, a conference may be a tactic on its own (although even then it should articulate your strategic choices—what kind of conference? what purpose does it serve?). Or instead, it may be the means to an end to support various other tactics (those related to education, networking, furthering research, public engagement, shaping an advocacy agenda, or others).

Crystal ball not required

Because the plan should stretch out a few years, there’s no way you can know exactly how things will pan out. Maybe there’s a fork in the road up ahead, but until you get there, you don’t know which one will be the best for you to take. You might need information that doesn’t yet exist, or you might need to wait on someone else’s decision. It’s perfectly OK to have some placeholders in further years for things you haven’t figured out entirely yet or which depend on someone or something else.

An initial idea generation should then be subject to shaping and rebucketing—connections are made between tactics, tactics are expressed more strategically. The outcome of this process should be a set of tactics that are a good start, although they aren’t final yet.

Because the next phase involves analysis of each tactic, you should be reasonably comfortable that this list is at least worth investing some further analysis into. (And in this case “you” most often means specifically the CEO or ED.)
As you proceed with this editing process, some aspects to bear in mind:

• Go back to any research you’ve conducted and to the rough notes from facilitated strategy discussions to see if there are tactical ideas that emerged there which should be considered now.

• Use a parking lot. There may be ideas that end up fitting somewhere but haven’t found a home in the tactics yet. Or they may not ever get any traction. But a parking lot can enable the discussion to move along without needing to provide a hard “no” to them at this point.

• Don’t vote on tactics. This is a common practice, especially where large groups of people are involved. What gets lost in a voting process is the dependencies between tactics, as well as tactics that may be important but aren’t widely understood. The discussion at this point should be based on logic, not popularity.

• It’s not necessary to rank or prioritize tactics either. If they are aligned to your strategies, keep them on the list and proceed to the next phase.

• See how your existing programs fit in. If there’s something you do that’s not there already, why not? (Does it still fit into your strategy at all?) But the existing operations need to be integrated—otherwise you don’t know what resources you can allocate where, and you end up later implementing two plans (the strategic plan and the “everything else” plan).

So now you have a list of your tactics. If you take that to your board, they might be pretty happy, but if you are the ED or CEO, you will want more confidence that you can make meaningful progress on these within a few years.
Think it through.

For each tactic, the information to develop could include:

- What activities are involved in each tactic—what will you actually do? This is not a full operational plan, just enough information to flesh out the tactic. (If all the staff suddenly left, would someone else at least know where to start?)
- Resources needed: Financial costs, but also staff and volunteer time, effort, and even political capital or member goodwill.
- Net revenue potential, if any.
- Metrics for success: How will you know you did it? How will you know it succeeded?
- Responsibility: Who is accountable to get this done?
- Collaboration: Who else (external or internal) should be involved?
- Time frame: When must this happen? When could this happen?
- Dependencies: What else needs to happen first? What else depends on this happening?
- Risk factors, although this analysis should be done only if they are significant (e.g., risk of new ventures failing, risk of significantly adverse regulation or policy outcomes).

The mechanics of capturing this information could be a template in Word that is filled in, one page for each tactic. It could also be a spreadsheet, one row per tactic or one row per activity. The main thing is to record—in just enough detail that it’s meaningful for your organization—what you are planning to do and analyze what you come up with.

Often, multiple individuals will provide this information, typically the people...
Don’t try to get every last detail down. You don’t have to plan the whole project. You just have to know the project exists and roughly what size and shape it is. Estimates and guesstimates should be embraced and even celebrated at this point.

On the other hand, the tactics should be strategically clear. Just saying “We want to engage members” isn’t enough. What do you want this tactic to achieve? What would success look like? What would it involve? Is it a massive undertaking or a relatively small idea? You don’t have to plan every last detail, but you do have to articulate what’s important and what’s not.

Guesstimate, but with strategic clarity

Cautious consultation

It may make sense to connect or reconnect with volunteers, partners, collaborators, or others as you are developing the tactics.

But be cautious that you don’t create expectations you may not be ready to meet quite yet, if ever.

Assess, adjust, and raise flags

Through this step, the list of tactics can change again—some will be dropped, combined, or reimagined as we think about how they will actually come to life and how they fit in with the existing operations. This should be built into the process and this expectation clearly communicated.

If people just put information unthinkingly or grudgingly into templates, it turns into a bureaucratic exercise that entirely misses the point. Don’t try to fit things where they don’t belong—rather, flag the issue for discussion.
CAN YOU DO THIS ALONE?

What if you work in an organization where the strategy-setting is just not getting done at the highest level, but you can’t fix that? What if there is dysfunction in your organization and strategic thinking is hard to come by? Can you still engage in this kind of process for your own work, your own department?

Staff often ask this question, and the answer is yes, but carefully.

- Set tactics for your own group strategically—make choices for your own success.
- Communicate clearly with all the important people, and gather support where you are going to need it.
- Be clear about what you are going to say no to—if you get pressure to say yes to something that’s not strategic for you, demonstrate what you will have to take off the table to make that happen. (“Yes, we can do more frequent newsletters, but in that case, we will not have resources for social media growth this year.”) Show your work, including your trade-offs.
- Make sure your performance expectations are consistent with the strategies or tactics you set—don’t go too far off the script you are supposed to follow.
- Frame your process as your own management style, but be alert for opportunities to share with your colleagues and spread it throughout the organization. (Just don’t expect to get as much credit for it as you will probably deserve!)
Almost always, the first draft that brings all the tactics together proves to be wildly overambitious. New exciting ideas have been grafted onto an existing organization that probably was already fairly busy to begin with. Making it all work might involve eliminating new ideas, combining ideas, discontinuing parts of existing operations, or generating new resources.

Assess your ambitions

Once they’ve been developed on their own, the tactics need to be reviewed as a whole to see whether they are collectively too much (or too little).

This is the time to assess the ambition of the plan. Does it look like enough to fulfill the promise of the strategy? And is it feasible?

Your analysis of the entire plan at this point may include:

- Financial analysis by year. This is not a budget but just a very rough estimate of the financial resources—both required and generated—for each year. Is this feasible? Do you need to change your timing or sequencing (e.g., prioritizing revenue generation) to afford what you want to do? Are there any tactics that need a more robust financial analysis (perhaps now or perhaps in the future)?

- Assessing the effort required, perhaps by adding up the percent effort by staff or roughly sizing the activities done by certain committees. If you are allocating 150% of your staff time or expecting your committees to do double what they’ve done in the past, is that realistic?

- Showing milestones by year, which is also a rough approximation of board workload. This could include an overlay of any external milestones (e.g., funding deadlines, elections, expiry of contracts, important conferences, etc.). Are there things outside your control that may nonetheless move and impact the whole plan?

Iterate—and dump

Almost always, the first draft that brings all the tactics together proves to be wildly overambitious. New exciting ideas have been grafted onto an existing organization that probably was already fairly busy to begin with. Making it all work might involve eliminating new ideas, combining ideas, discontinuing parts of existing operations, or generating new resources.

Will these tactics really get you where you want to go?
These might be programs or services that you currently do but which haven’t really found a home in the current strategies. It’s important to assess them for strategic fit. Should you be doing them? Do you need to rethink them or discontinue them? This analysis is also a good tool to assess the strategies for relevance. Should they stretch to include these programs or services? If so, why?

**Deal with leftovers**

Make sure there’s some slack in your system for things that come up. These may be disasters, opportunities, or windfalls, but over the course of a few years, you’re guaranteed to have at least one of these and maybe a bit of everything. Your organization and the people in it will also learn and be capable of different things. Leave a bit of room to accommodate this. Some tactics may just be placeholders for something you know you’ll want to do later but don’t have the details on. Again, this requires getting rid of some tactics that aren’t valuable enough to move your strategy forward, so you have some space for innovation and adaptation.

**Leave some breathing room**

Seeing everything together highlights opportunities for connections between tactics, ways to combine resources more effectively, or communication pathways that might otherwise have been missed. A parking lot can be used so you don’t lose the thinking that went into those ideas, but don’t let it be confused with the actual plan.

**Take a big step back**

Once the plan is pulled together, take a big step back. Have ideas emerged from the tactics discussions that should change the strategies? Does the board need to consider anything new? How big a departure does this represent for the association? If your tactics are executed successfully, will that really address your key strategic issues? If not, what else do you need to consider?
FROM PLAN TO REALITY

A tactical plan should lead directly to change—in your reporting, your performance measures, even in your schedule for tomorrow.

Getting approval

Typically, association boards approve strategies explicitly, but they approve the tactics in principle. This recognizes both the board’s governance role as well as the degree to which tactics change.

This approval point—which ideally is an in-person meeting—is a great opportunity for the board to consider wider issues that have been raised through the tactical planning discussions. It should be seen as part of the strategy-setting process, particularly because strategies themselves may be amended.

Getting started

- Share the plan with the organization to guide thinking and decision-making, starting right away. For a larger organization, this may be a more formal communication effort, but it should not be delayed.
- Management team, individual department, and committee meeting agendas should be based on the plan. New initiatives should be launched. Of course, many existing activities that were validated by the plan will simply continue.
- Budgeting is where commitments become real. The logic of your strategy has to drive your budgeting choices,
Getting ready to measure your progress

• Board reporting should focus on the strategies being implemented and the metrics identified to measure their success. Consider whether you can get rid of department-level reports entirely.

• Existing objectives for programs such as your conference, your educational programs, advocacy campaigns, marketing, and so on need to be reviewed to make sure they are aligned with the strategic plan and the tactics they support.

• Performance expectations of the staff, however those are formalized in your organization, should align with the plan. Some may only need a minor tweak, while others may need a full rethink. Start at the top of the structure and work your way down.

Getting the word out

Communication is a great way to signal commitment to your strategies and build support for them. If you did significant research or consultation in developing your strategies or tactics, participants will be curious to hear what happened to their input.

• Incorporate the plan into member-facing and public communications (website, newsletters, annual report, etc.), with a focus on what those audiences will be most curious about.

• Connect with other organizations (peers, collaborators, funders, regulators, etc.) with a particular focus on areas where you are looking for their support or engagement.

• Ensure the board has a strong understanding of the plan; orientation materials should be based on the new strategic plan and give some additional background as to how it was arrived at—its logical underpinnings—as well as the board’s role in strategic stewardship.
Tactical planning is the way the strategies become
becomes truly owned across the organization.

A plan keeps you from chasing every butterfly someone decides is pretty. It
gives you a foundation on which to base decisions—including decisions to say no
to ideas that will take up resources and take you off track.

But any plan is based on hypotheses about how events will play out both inside and
outside the organization. The plan should be developed with the understanding that it is a living document. There should be absolutely no expectation that the way it looks at the beginning will be precisely how it will roll out.

So check in regularly. Building in measurement and reporting is important. But it’s not a bureaucratic exercise. Make sure there’s time set aside regularly to have a broad-based, challenging discussion about whether you’re going in the right direction. This should probably be an annual event around the board table, and should include inputs from staff and volunteers who have had similar conversations beforehand. It uses the current plan as a jumping-off point but takes a critical and expansive view.

Appreciate effort, especially where volunteers are involved, but assess results. Did you implement what you planned? And did it have the outcome you were hoping for? Has anything changed in the environment that you need to take on board?
Tactical planning can be a galvanizing, exciting experience for the association. It can break down the barriers between “strategy” and “execution”, and give everyone involved a real sense that the association is set up for success.

The result will be a plan that’s:

- **Relevant**, because it takes a strategic approach, focused on what’s really important to the association
- **Flexible**, because the logic of the plan is understood broadly, so it will be clear where changes are needed (and where they should be resisted)
- **Feasible**, because it’s been pressure-tested by the people who will get it done

If you would like to discuss how we can help you develop your own strategies and turn them into action, please get in touch.

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**Meredith Low Consulting** offers strategic and tactical planning, member needs assessment, strategic conference assessment, and other strategic consulting services to associations. Founder Meredith Low is a highly experienced management consultant, focusing on helping organizations understand how, when, and where to grow and change in the context of fast-moving environments. Her career spans engagements with associations and other not-for-profits, small to large companies (including the Fortune 500), and government. The firm has worked with associations in health care, financial services, natural resources, construction, education, risk management, urban planning, and others.