

PRE-PROGRAM
RESEARCH

ORGANIZE A
MEETING

CREATE
THE PLAN

IMPLEMENT

EVALUATE

Strategic Planning Toolkit

smps[®]

Society for Marketing
Professional Services

smps.org

Strategic Planning Toolkit

SMPS thanks our members for developing this resource.



All Rights Reserved
Copyright © 2013, 2018, 2022 by the
Society for Marketing Professional Services

2022 TASK FORCE MEMBERS

Amanda (Sigafoss) Prevendar
Marketing Director, AUX Architecture

Amanda Bohnert, CPSM
CMO, S. M. Wilson & Co.

Sarah Hoff
Senior Business Development Leader,
Woods Bagot

Julia Meade, CPSM
Director of Marketing & Business
Development, Brinkley Sargent Wiginton

Diana Soldano, FSMPS
Director of Marketing, Hayduk
Engineering, LLC

2013 TASK FORCE MEMBERS

Chair

Stacy A. Stout, CPSM

Committee

Alison Carney, CPSM

Karen O. Courtney, AIA, FSMPS

Nicole Larroque Dufour, CPSM

Rick Evans

Table of Contents





We Know You Want To...

Inspire members to get engaged.

Create activities and events that make an impact.

Provide tools for chapter committees to be successful in their efforts.

Provide programming that educates, connects, and advocates for A/E/C marketers and business developers.

This Toolkit Was Made for You.

This document contains the elements of strategic planning—a framework to help you determine where your chapter is going and why, as well as what you should focus on to get there. You can use it as a guide as you go through your strategic planning, and as you see fit for your chapter.

We have included practical exercises and a list of components to use during a strategic planning process. There is no one right way to do a strategic plan. The best approach is to find a process that works for you.

However, the foundation of your chapter strategic plan should reflect the vision of SMPS.

You'll use this framework to support the overall SMPS mission on a local level.

This toolkit provides insight to you and your board from broad perspectives. We share what we have learned from working with HQ's strategic plan and other chapters. Our task force members have found this to be a rewarding process, and we hope you find value in it as well. Make the most of your SMPS involvement by charting a successful path for you and your board.

LET'S GET STARTED.

WHY CONDUCT STRATEGIC PLANNING?

- Helps address critical issues and find innovative ways to achieve goals
- Provides continuity for new leadership and focus resources efficiently and effectively
- Provides a forum to gain commitment from board members and address common goals
- Provides your chapter the opportunity to make a significant impact!

i
If you fail to plan, then you plan to fail. Be proactive about the future.



THE BASICS

The toolkit covers each of these in more detail, but here’s an overview.

Who

These considerations apply to the overall strategic planning process, not necessarily the planning meeting.

- Incoming chapter leadership
- Other chapter stakeholders, such as chapter advisors and SMPS Fellows
- Members of the Society board and/or staff
- An independent facilitator to help guide the discussion and keep participants on track

WHAT

Strategic planning takes you outside the day-to-day activities of your chapter and into the big picture, helping your chapter leadership to determine where you are now, where you’re going, and how you’ll get there. It’s time to challenge the “because-we’ve-always-done-that…” mentality and way of planning chapter activities. Ultimately, it sets the ground rules for making choices on what you will and will not do.

When

Strategic planning is an ongoing process, not a single event. However, we want to emphasize that not all elements of this process have to be done each year. The goal is to choose which components of the process to focus on that will drive specificity and success.

- Every three years: Strategic Planning Meeting
 - ✓ What does the SMPS vision and mission mean to the chapter?
 - ✓ Strengths, Weaknesses, Opportunities, and Threats (SWOT)
 - ✓ Objectives, Goals, and Strategies
- Annually: Board Planning
 - ✓ Prior to the end of the SMPS fiscal year and board changeover (September); ideally, shortly after the spring Chapter Leadership Symposium.
 - ✓ What to accomplish:
 - Review and update (if necessary) strategic plan
 - Set priorities and annual goals
 - Create action plan

Where

Ideally, the in-person meeting should be held in a setting that allows all participants to fully engage and eliminates distractions. The goal is to stimulate creative thinking and collaboration.

THE PROCESS

The steps involved in developing a strategic plan are described below. Although this process appears systematic and rational, it’s often iterative and evolves substantially over time.

These steps are a recommendation but not the only recipe for creating a strategic plan; other sources may recommend entirely different steps or conduct them in a different order. However, the steps outlined below describe the basic work that needs to be done and the typical products of the process. Once you start strategic planning, you’ll soon find your own approach to the process.

PHASE 1 | CONDUCT PRE-PROGRAM RESEARCH

- The Environment: Current and Future
- Stakeholder Input
- Competitive Analysis and Influences
- Exploration of Opportunities for Collaboration
- Elephants in the Room and Things Not to be Questioned
- Blue-Sky Thinking
- Healthy Chapter Checklist and Other Chapters

PHASE 2 | ORGANIZE A MEETING

- The Strategic Planning Meeting
- The Attendees
- Location
- Duration
- Facilitation
- The Agenda

PHASE 3 | CREATE THE PLAN

- Beginning the Session
- Where We Are Now
- Where We Are Going
- How We Will Get There

PHASE 4 | IMPLEMENT

- Tasks/Activities to be Implemented
- Responsible Parties
- Time Frame for Implementation and Completion

PHASE 5 | EVALUATE

- Direction/Alignment
- Accountability
- Teamwork
- Measurement

PHASE ONE



Pre-Program Research

Much of the work that goes into making a strategic planning session successful occurs before the actual meeting convenes. Gathering information and insights about your chapter, its members, its competitors, potential collaborators, and the external environment will give you a foundation upon which to form the plan.

It's also helpful to have some historical knowledge about why the chapter is in its current state, the internal and external factors that impact it, and a clear sense of any preferences or biases of the members.

Strategic planning works best when complimented with current and relevant data. It's necessary to do the research to obtain the data and give participants time to digest it before applying it in the strategic planning process. Typically, this research involves seven main areas.



It is helpful to review your chapter bylaws to ensure that your ultimate plan will support and/or reinforce each other.

1. THE ENVIRONMENT: CURRENT AND FUTURE

Most important to a successful strategic plan is having a realistic view of what the environmental influences will be on the chapter in the near future or during the planning horizon time frame.

Environmental Scans

Environmental scans are a way to study the political, economic, social, and technological (PEST) factors that influence a chapter and its future. Often added to this list are environmental and legal (PESTEL), with each area examined in terms of trends, issues, events, and expectations that will affect a chapter. An environmental scan helps a chapter to be aware of factors that it cannot control but that will impact its future.



2. STAKEHOLDER INPUT

Chapters should, at a minimum, gather stakeholder input. This input will provide important direction on setting strategic objectives. Stakeholders may be current and past board members and volunteers, chapter advisors, SMPS Fellows, SMPS CPSMs, long-term community partners, and more.

Focus Groups

Focus groups provide a qualitative research method that engages stakeholders to gain information about their beliefs, opinions, perceptions, and attitudes about any component of a chapter's service. In this moderated group setting, focus group participants freely interact to questions or concepts presented by a skilled facilitator. Focus groups are particularly valuable for getting feedback on new projects or ideas.

Today, focus groups can be conducted in person and online. Their primary value is to explore issues and gather insights that can later be used to develop quantitative market research questions used with other research methods, such as surveys, to gain customer or member insight.

One-on-one Interviews

Interviews allow key stakeholders to express their opinions and to offer personal insights without the influence of others in a focus group. There's usually a common outline for each interview, and the primary goal is to capture qualitative data that this type of conversation can reveal.

Interview individuals who will and will not be part of the chapter planning sessions. For those participating in the planning, the one-on-one interviews also can be used to discuss their goals so that they come with some advance thinking to contribute.

Consider interviewing past chapter leaders and members who may have left the chapter to learn their perceptions.

Online Surveys

Many chapters conduct online surveys each year. The questions can address a variety of topics and be qualitative and quantitative. While they don't allow for the in-depth responses and probing that can happen during interviews and focus groups, they do allow chapters to reach a broader group of stakeholders. Convenience and time factors make this an appealing option to gain stakeholder input. Survey examples are available in the All Chapter Leaders Community of MySMPS.

3. COMPETITIVE ANALYSIS AND INFLUENCES

When creating a strategic plan for a professional organization, it's easy to be too inwardly focused. Marketing an organization will be successful if you understand who the competition is and make a competitor analysis part of strategic planning. To differentiate a chapter, it's helpful to know with what you are competing for members' support as well as factors that may not yet be present.

Conducting a competitive analysis requires you to take an inventory of the resources for which you and other professional organizations must compete. Just as for-profit companies face competition for customers, professional organizations must deal with competition for the often-scarce resources needed to operate their programs and serve their members. These resources include sponsorships, speakers, and volunteers. Use this inventory to identify which resources are especially important to your organization and the areas where the shortfalls are particularly problematic. Understanding the gaps in your resources can serve as a starting point for developing strategies for overcoming these constraints.

Take a look at your audiences to find this information. To what other organizations do they give their time and money? If you don't know, survey them or try to find local demographic research about what organizations they're most likely to support.

The point of the competitive analysis is to identify possible advantages your chapter has over other organizations and how to use that information to develop and market programs and involvement. The competitive analysis also can identify organizations you might be able to collaborate with, rather than solely compete against.



Many chapters do not conduct a full competitive analysis during their planning process. At a minimum, it's important to know what your competitive advantage is. To read the Society's messaging and value propositions for members, companies, and chapters, refer to the Membership section of the Chapter Management Manual.

4. EXPLORATION OF OPPORTUNITIES FOR COLLABORATION

There may be organizations that are current competitors who may be open to partnership. Consider your community. Do members and target audience gravitate toward select organizations other than SMPS?

Much like a competitive analysis, take inventory of any programs where you see crossover of topics, speakers, themes, or potential attendees. This may help you identify organizations where partnerships may be viable. To start, perform outreach and discuss potential joint programs and events.

5. ELEPHANTS IN THE ROOM AND THINGS NOT TO BE QUESTIONED

Although it would be ideal if there were no constraints on the strategic planning process, reality often dictates issues that need to be acknowledged before good planning can begin.

"Elephants in the room" are those big things that, if not acknowledged, they will scuttle the best laid plans. They need to be addressed to clear the air. For example, a chapter might struggle financially, so planning objectives need to bear this in mind. Or there may be disalignment between board members, so it helps to clear the air and agree to work together for this effort, or at least agree to disagree amicably. Or there may be an ongoing feeling that not all participants are being heard and some participants are monopolizing the conversation, so it's important to include all in the conversation, listen to them, empathize with perspectives, and appreciate diverse viewpoints.

"Things not to be questioned" are a bit different and refer to things that usually can't be easily changed, discarded, or negotiated because they're valued by all or some of your stakeholders. Often, there are things in the history of a chapter or traditions that might suggest things not to be questioned.

6. BLUE-SKY THINKING

During strategic planning, no idea is a bad idea. Use the following questions to encourage blue-sky creative thinking that is open to brainstorming without limitations, judgement, or consequences. These questions below may be distributed ahead of time so that participants can consider them and be prepared for the actual planning process. They also can be used to develop an environmental scan that solicits input from members.

- What non-traditional or off-the-wall/out-of-the-box ideas are worth exploration in our deliberations or plan?
- In the first 12 months of this new plan, what has urgency and must be a priority to be accomplished?
- What top three to five tangible results will be indicators of success for the chapter over the next three years?
- If you could see one positive change for the chapter over the next three years, what would it be?
- What are the chapter's top three strengths that should be leveraged as we move forward?
- What are the chapter's top three weaknesses that should be "shored up" over the next three years?
- If we are successful in formulating a successful roadmap for the chapter, what are the top five questions we will have answered in the strategic plan?
- If you could change one thing about the chapter, what would it be (if money were no object)?

7. HEALTHY CHAPTER CHECKLIST AND OTHER CHAPTERS

The [Healthy Chapter Checklist](#) is intended to be used as a tool to objectively indicate where a chapter's management practices stand. It provides an incredible resource to inform the planning process. The checklist is designed to identify and recognize outstanding chapters and set benchmarks for successful chapter leadership and services.

In addition to reviewing the Healthy Chapter Checklist, it's helpful to reach out to other chapters. SMPS offers several options for chapter leaders to connect, including the MySMPS All Chapter Leaders community, your chapter president's Chapter Leadership Symposium class, and at the SMPS annual conference and regional conferences. SMPS HQ is another resource to gain ideas and insight on seizing opportunities and addressing challenges.





PHASE TWO



Organize A Meeting

Holding a successful planning meeting is a key factor in the success of your chapter and its board. Setting aside this time to meet should accomplish the following goals:

- Encourage a positive working relationship amongst board members
- Encourage participation of new leaders to advance fresh ideas and approaches to chapter management
- Create a working plan for the upcoming year—goals, objectives, and measurements of success

This meeting is not normally:

- For committee chairs or incoming and outgoing board members to hand over handbooks of policies and procedures and go through them in detail
- To plan programs or events in detail (speakers or topics)
- To list sponsor targets and decide sponsorship levels
- To discuss tactics for building membership

The above items should be discussed during committee-specific meetings.



Throughout the year, the current board should identify future leaders in preparation for succession planning. Integrating some of these potential leaders into your planning session will encourage new ideas and keep the chapter looking at ways to continuously improve its processes and “raise the bar.”

THE STRATEGIC PLANNING MEETING

A vast majority of SMPS chapters schedule an annual board retreat, where strategic planning takes place. This is considered the kick-off meeting of the new board and will often include both incoming and outgoing directors. Although SMPS chapters vary greatly in their make-up—large, small, medium, new, long-standing, serving a single metropolitan area, or serving a state (or multiple states)—the goal is to revisit the existing strategic plan or create a new strategic plan during this meeting. It’s important to host your annual board retreat in a casual space that’s also conducive to strategic planning and open discussions.

Some chapters schedule planning sessions with individual committees months in advance of the retreat. In other cases, the incoming president might meet with each chair (both incoming and outgoing) on a one-on-one basis prior to the retreat. The objective is to have a relatively seamless transition from year to year.

It’s important to note that a transition meeting is not the same as a strategic planning meeting. A transition meeting focuses on the tactical transfer of information from person to person to successfully run a committee and/or perform in a board position. The strategic planning session focuses on the “big picture” of the chapter.

THE ATTENDEES

100% Board Attendance Is Critical

All board members should attend and fully participate in the entire board retreat or meeting.

This should be made clear to members when they decide to run for the chapter board. Set your meeting date early and communicate it to the directors.

Outgoing/Former Board Members

It can be helpful to selectively integrate former board members in this session. They possess historical information and a unique perspective that can be beneficial to the process. Find those who are interested in supporting incoming leadership and seeing the chapter progress to the next level.

Committee Chairs

Including committee chairs in the annual planning meeting is an opportunity to engage future board leadership. A key element of success for the coming year will be implementation, so it’s key that committees understand and buy in to chapter goals and priorities and participate in setting measures of success or deliverables for the coming year.

BEGINNING THE SESSION

The following are activities to consider in your planning meeting.

An icebreaker is a great way to begin the planning meeting and can get participants involved and interacting with each other. The activity helps the meeting begin in a positive way by getting the board off the stresses of their day. Ask them to share something about themselves to lay the foundation for team building. Here are some ideas for icebreakers.

- Use an assessment tool such as StrengthsFinder®. This tool reveals the top five talents of the individual and helps explain how they connect with others, learn and gather information, and are motivated and inspired. By understanding each other’s differences, you can find common ground and work better together.
- Partner up and interview each other and then share what you learned.
- Ask each participant to bring an item (requires preparation) or sketch an image that represents either:
 - A part of whom they are (this makes it more personal)
 - The topic to be discussed at the meeting (represents your SMPS chapter or the future of your SMPS chapter)
- Give each participant an 8.5”x11” sheet of paper, markers, and tape (you’ll need wall space). For 10 minutes, think about the other people in the room and write down stand-out, positive memories of working together, learning from each other, or participating in some way in SMPS. For another 10 minutes, draw the memories, share them, and then tape them to the wall. Ask for volunteers to discuss the memories they posted. This is a good way to acknowledge the team’s efforts and create a positive vibe before kicking off the retreat.
- Ask everyone to make two statements about themselves—one that is true and one that is not true; attendees have to guess which statement is not true.



It’s very difficult to be facilitator, note taker, and participant—if you try to do this, your planning meeting is likely to fall off-track or your plan will not be well documented. Invest in a facilitator to make this a productive session that benefits participants and, ultimately, your chapter.



LOCATION

Your venue will depend on the budget available. Options may include hotel suite, conference room, private dining room, or even the home of one of the members. Ideally, a casual, Americans with Disabilities Act-compliant meeting space that limits attendee distractions should be sought. The location should be comfortable and allow participants to spread out. Also allow room for flip charts (and wall space if you plan on sticking notes up on the wall) and have audio/visual available. Refreshments are a must, along with meals.

Outside of the physical environment, the atmosphere should be one of inclusion and positivity, rather than being dismissive or overly critical of new ideas. This helps build the plan on a positive foundation and enhance relationships among board members. The president-elect or facilitator can set this tone at the beginning of the meeting.

DURATION

The duration of the strategic planning meeting can vary depending on the chapter's needs and what's covered. At minimum, chapters should schedule a half day for strategic planning. Others may wish to break up the session into two days. Each chapter will have unique dynamics that will guide what works best for them. It's best to get consensus before scheduling. The strategy planning portion of the meeting will cover a half day at a minimum. If you plan to incorporate conversations about transition of duties and more specific action planning, allow more time.

FACILITATION

It's strongly encouraged to have a facilitator who can be a timekeeper, ensure balanced participation, bring the conversation back on point when it drifts, and keep the group on task. You might find this skill in a past leader of your chapter, but make sure they understand that the role is to facilitate and not participate. Some chapters engage past presidents from other chapters, Fellows, Society board members, or HQ staff to facilitate the process. These outside perspectives will bring new insight to the board and enhance the planning process.

An outside facilitator benefits the process in many ways.

- There is a designated person to keep order, prevent issues from becoming personal, and keep the process on track without becoming emotionally involved.
- When topics tend to go off-point the facilitator may use the parking lot method where those items are written down to be discussed at a later date.
- Everyone else is free to get involved in the process without worrying about process issues.
- A skilled person is available to deal constructively with any conflicts that may arise.
- The facilitator can raise issues and assist the board with difficult conversations.
- Someone with extensive experience is available to offer insights, ideas, and an outside perspective.
- Provide time for icebreakers
- Know what you want to achieve—have clear outcomes for the process.
- Know what you have to cover to achieve these outcomes—know what steps you have to work through.
- Know what additional issues need to be dealt with in the time available.
- Prioritize the discussion areas.
- Don't be inflexible but do have a commitment to timekeeping.
- Make sure someone records what is said and, most importantly, what is agreed (a record of important discussions and decisions).
- Whether or not you decide to use an outside facilitator, make sure that someone is responsible for and prepared to lead each part of the discussion.
- Build in steps that involve all participants—you need to create buy-in and enthusiasm for the plan and associated action plan.
- If you have asked people to do preparatory work, make sure this is taken into account in the agenda so that the participants feel their efforts are valued.
- If you're using an outside facilitator, have them participate in planning the agenda for your meeting. They should understand what you want to accomplish from each segment of the agenda.
- Create a packing list for the meeting. This may include sticky notes, markers, pens, flip charts, a binder for each attendee that includes your bylaws, roles and responsibilities, organizational chart, past chapter plans and goals, any recent survey results, and more.





Create The Plan

PHASE THREE



The day is here, and it's time to get to the meat of the strategic planning process. This is defining the strategic framework within which your chapter operates. A strategic framework can include the following.

WHERE ARE WE NOW?

- Clearly articulated values
- The SMPS mission
- Strengths, Opportunities, Aspirations, and Results (SOAR) or Strengths, Weaknesses, Opportunities, and Threats (SWOT)
- Overview of the pre-work

WHERE ARE WE GOING?

- The SMPS vision
- Competitive overview/advantage

HOW WILL WE GET THERE?

- The strategic objectives of the chapter
- The goals/priorities/initiatives on which the chapter intends to focus
- Action items



Core values reflect what is truly important to an organization. They do not change from time to time, situation to situation or person to person, but rather they're the underpinning of the chapter's culture.

WHERE WE ARE NOW

Start the Planning Process by Celebrating the Past

The purpose of this exercise is to take a critical look back at the past fiscal year. It's important that the board members responsible for the previous year are involved in this review.

Each current board member should review the successes of the past year and offer commentary on ways to improve going forward. This is not a critique of the people involved; rather, it is a critical look at the activity for which the board member is responsible. Each board position (including secretary and treasurer) should participate in this critical activity. It's both a time to celebrate and reflect.

Values

Your chapter's values are the shared values that underpin your work as an chapter and your relationships with members and other stakeholders. Your chapter's values will determine your strategies and your operational principles.

Clarifying and reaching consensus on your chapter's values is important because it provides a basis for making difficult decisions. The kinds of questions you should ask and decisions you need to make based on your organizational values include:

- Should we work with this group of people, or project, or chapter?
- Should we spend money on this?

- Is what we are doing worthwhile, or could the money/effort be better spent doing something else?
- Is the way we are going about this project consistent with our values? If not, what should we do?
- Is the work we're doing consistent with our stated values?

The best way to identify your chapter's values is through a brainstorming exercise. As a group, everyone should identify a word or words they feel represent the chapter. Put all of these words on a flip chart (or several, if needed). Once you feel everyone has had an opportunity to weigh in, narrow the list down to the top five.

This an important area to use the feedback you gained in pre-work. In the feedback from members and other stakeholders in surveys or focus groups, can you find any common threads of words conveyed about the chapter that tie to the words your board members identified? These common threads are a good indication that the values you identified are a true representation of the chapter.

Mission

Mission statement components include the purpose, values, and goals of a company.

SMPS chapters should follow the Society's mission statement and use it to guide their planning efforts—they should not develop their own mission statement.

Chapters that successfully adopt and promote the organizational vision and mission and the Society's strategic plan as a framework, produce better outcomes.

The SMPS Mission Statement

To advocate for, educate, and connect leaders in the building industry.

SOAR or SWOT Analysis

Moving to this phase of the process marks the end of looking at the individual components of the chapter. Now it is time to start looking at the chapter as a whole organization—the sum of all its parts. This is an interactive process that involves the entire board brainstorming together. Typically, responses are recorded on flip charts and posted around the room.

SOAR Analysis

A SOAR analysis is an organizational development method that assumes the questions we ask will focus our attention in a particular direction. SOAR is an acronym for:

Primarily, SOAR focuses on expanding what an organization does well rather than on eliminating what it does badly. Through an inquiry method that appreciates the positive and engages all levels of the organization, it seeks to renew, develop, and build on these attributes.

As a self-defined “asset-based approach,” it starts with the belief that every organization and every person in that organization has positive aspects that can be built upon for the betterment of the organization. When all members of an organization are motivated to understand and value the most favorable features of its culture, it can make steady improvements.

Fundamental to the rationale for using this method is research that concluded that excessive focus on dysfunctions can cause them to become worse or fail to become better. This method gains its power from appreciating and valuing the best of what is, envisioning what might be, engaging in dialogue about what should be, and innovating what will be. Thus, the SOAR analysis should be referred to often during the strategic planning process. It should also be kept in front of the leadership on a least a quarterly basis to use as a measurement tool and to celebrate the successful accomplishments of your chapter's strategic plan.

Strengths

What are our greatest assets?

Opportunities

What are the best additional opportunities for us?

Aspirations

What is our preferred future?

Results

What are the measurable results we want to achieve?

SWOT Analysis

A SWOT analysis is a planning method used to evaluate an organization's external and internal:

Strengths
Weaknesses
Opportunities
Threats

It can be used on a macro level for a business enterprise or a micro level for a specific project. The SWOT analysis can be helpful in determining an organization's competitive advantage as it seeks information about competitors and tries to match strengths to opportunities. Conversely, it can be used to turn weaknesses or threats into strengths or opportunities, particularly helpful for new endeavors or service offerings.

When employing this method, it is important that the group doesn't get carried away focusing on external factors like competitors without spending the appropriate resources in examining the internal factors that are more under their control.

WHERE WE ARE GOING

Vision

The vision statement answers the question, "Where do we want to go?" It captures the organization's guiding philosophy and inspires its members, volunteers, and stakeholders. It shapes the framework and gives the organization a basis on which to answer the following question:

Will this goal, objective, or activity help us to make a contribution to our vision? Chapters should use the SMPS vision statement during the planning.

The SMPS Vision Statement

Business transformed through marketing leadership.

Looking to the Future

The purpose of this exercise is to begin to think about the coming program year on committee-by-committee basis. It's very important that the incoming board members responsible be involved in this exercise. The ideal situation is if both the incoming and outgoing board members can be included.

Each current and incoming director should talk about plans for the coming year as it pertains to their area of responsibility. The intent is not to describe tactics, but rather, to offer a broad-brush description of the key items each director plans to accomplish in the coming year.

HOW WE WILL GET THERE

After reviewing where your chapter is now and coming to consensus on your chapter's trajectory, you'll then want to reach consensus on priority items. The priority items will turn into your strategic objectives and goals and will be supported by your action items.

Strategic Objectives

Strategic objectives are long-term and connect the mission to the vision. Holistic objectives encompass four areas: financial, customer (membership), operational (programming), and people (volunteers).

What are the key activities that you need to perform to achieve your vision?

Examples:

- Increase membership
- Improve overall programming
- Increase member retention
- Continually improve internal processes
- Improve organizational structure
- Improve committee communications
- Develop leadership abilities and potential of board/future board
- Develop a communications strategy to inform diverse populations of the chapter's activities and invite them to participate.

Goals

Short-term goals convert strategic objectives into specific performance targets. Effective goals clearly state what you want to accomplish, when you want to accomplish it, how you're going to do it, and who's going to be responsible. Each goal should be specific and measurable.

SMART is a mnemonic to help us remember essential elements when setting goals. SMART stands for Specific, Measurable, Attainable, Realistic, and Timely.

Specific
Measurable
Attainable
Realistic
Timely

What's the difference between a smart goal and an unsmart goal? Measurement.

- Unsmart Goal: We want more members.
- Smart Goal: The membership committee will increase new membership by 20% by the end of this year.

Goals should compel the chapter to action and be:

- Specific enough so results can be quantified and measured
- Simple and easy to understand
- Realistic and attainable
- Convey responsibility and ownership
- Acceptable to those who must execute them



Action Items

Action items are specific steps that will lead to implementation of your goals. They include start and end dates and appoint a responsible person. Ensure your action items are comprehensive enough to achieve your goals.

Actions items:

- Identify the specific steps that will be taken to achieve the strategic
- Objectives—where the rubber meets the road
- Support each objective
- Point toward operations, procedures, and processes
- Describe who does what, when it will be completed, and how the chapter will know when it has been completed
- Require the monitoring of progress



Goals and action items are discussed in detail in Phase 5: Evaluate.



PHASE FOUR



Implement

The completed action plan should include:

- Tasks/activities to be implemented
- Responsible parties
- Time frame for implementation and completion

So, now it's time to implement the action plan!

IMPLEMENT



What if you don't have many committees? Or what if the board IS the committee? First of all, set some goals to implement a committee structure and recruit volunteers and future leaders. During your strategic planning session, you may end up getting into some details, but still try to spend the time identifying big- picture goals and champions, and leave the granular activities— like planning specifics on your monthly programs, for example—for follow-up meetings.

THE IMPLEMENTATION

It's fine for the action plan to be simple, big picture, and dynamic. Leave the flushing out of details to the chapter's committees and volunteers. Why? Because these very people—who are essential to the success of your chapter—want and need to get involved in implementing and achieving the activities and goals of the plan. Their participation and involvement facilitate the investment of themselves in the chapter and SMPS as a Society.

Having as many members as possible involved in implementing the activities that support achievement of the plan brings amazing value and benefits. When this is done effectively, the following desirable things happen.

- Members become a part of achieving something together (they become a part of something larger than themselves)
- Members contribute ideas and volunteer their time and energy (spreading the workload around)
- Members share with other members and volunteers the chapter activities they are involved in, creating a buzz

- Members learn from one another, fostering continuous learning and sharing
- Members get to know one another and develop lasting relationships, growing networks and friendships

The chapter's committees are best equipped to flesh out the details of the activities and gain the benefits of camaraderie, teamwork, and planning/refinement of said activities. Inviting people to be involved in implementation is extremely important to the chapter—do not underestimate the power of this one thing! If the same people do the work all the time, other members may feel excluded, disconnected, or not truly a part of the whole. Inviting them to participate in specific tasks or asking for their assistance on a committee or team can truly be a gift.

In keeping with the theme of getting members involved, here are several ideas to consider and/or to help inspire ideas of your own.

Detailed Approach

(Special task force)

Connect with up to seven members of varying membership experience (from new to long-term members). Invite them to be part of a special task force responsible for working with appropriate volunteers and creating a matrix of the following, which are essential to implementation of the plan:

- Objectives
- Goals
- Specific tasks
- Time frames
- Responsible individuals or committees
- Form of measurement
- Status

The task force might be led by one or two board members, with other board members participating as available.

The task force's purpose, in addition to creating the matrix, would involve periodic check-ins with the responsible individuals to monitor status of the tasks, measuring how the chapter is doing in terms of meeting its objectives and goals. Measurement could be simple: using 1) red, 2) yellow, and 3) green indicators to score, respectively, whether the 1) task is not progressing and needs immediate and focused attention, 2) task is progressing but needs improvement, and, 3) task is progressing well and/or is completed.

High-Level Approach

(Committees)

Board members ask committees to develop their respective goals and tasks in support of overall objectives. Committees (not the board) determine the details, such as the number and frequency of educational programs, networking events, client panels, community outreach opportunities, CPSM boot camp sessions, recruiting campaigns, etc.

Each committee is chaired by a board member who keeps the overall chapter board updated on committee activities and ensures the committees are getting the support and resources they need to complete their tasks and meet their goals. Through this arrangement, the board provides support and is able to make adjustments to help committees as needed. Examples of adjustments might include:

- Matching additional volunteers with a committee that is in need of assistance
- Stepping up public relations for a committee with an upcoming program
- Assisting before any issue or concern becomes a serious problem

The individual committees would be responsible for self-evaluating based on their respective goals and tasks; the committee chairs would then update the chapter board at regular board meetings or through a consent agenda report.



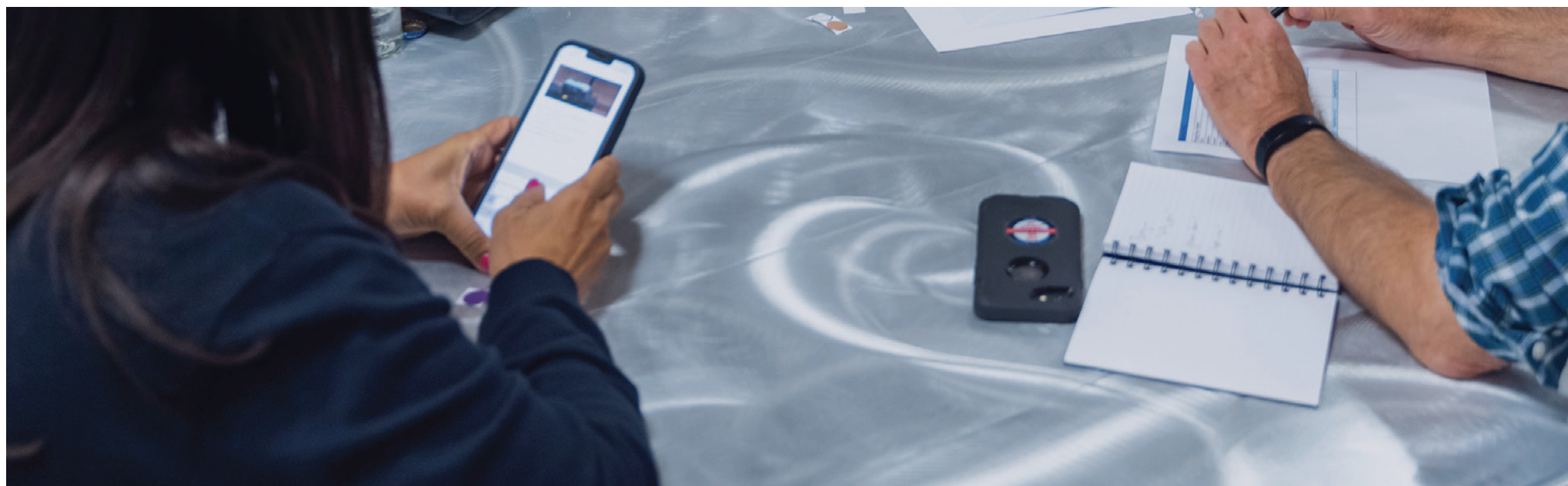
Evaluate

Now that you have created the plan, the resulting benefits include:

- Direction/alignment
- Accountability
- Teamwork
- Measurement

The action plan—with the components identified in Phase 4 (tasks/activities, responsible parties, and time frame)—should be very familiar to you throughout the year. Once you create the plan, don't just file it away—communicate it clearly to your members.

PHASE FIVE



Review it together at board meetings, make sure the committee chairs and members have the plan and that they know what part they share in it. Then post it a variety of places: on the chapter web site, in your chapter handbook, for member access on mysmps.org, etc. The more visible and accessible the plan and the better it's understood by your chapter membership, the higher the likelihood that you'll meet your goals and objectives.

SMARTER GOALS

What are some specific ways to measure and evaluate your progress? First, consider your goals, objectives, and the tasks/activities in your action plan. Assuming you set SMARTER goals, the progress towards them will be measurable!

SMARTER is a mnemonic to help us remember essential elements when setting goals. SMARTER goals involve the following:

Specific	You identify the goal precisely and clearly. For example, “join a health club and work out three times a week” versus “get in shape.”
Measurable	You establish criteria to measure progress toward reaching the goal. How will you know when the goal is achieved?
Attainable	You have or will develop the capacity and capability to actually reach or attain the goal. You may have to develop abilities or skills or change behaviors to be successful.
Realistic	Are you willing and able to work towards the goal? The goal is not unreasonably optimistic.
Timely	There is an identified time frame for reaching the goal. This creates a sense of priority.
Evaluate	You assess and evaluate progress regularly and adjust as needed.
Reevaluate	You review and assess whether you achieved the goal, determine what went well and what did not, identify what you learned, and record the results.

Implementation, Evaluation, and Measurement

Examples:

1. Perhaps a goal is to increase-senior level participation/retention in your chapter. (Ideas for how to attract and maintain senior-level participation can be shared between chapters—reach out and take advantage of the resources throughout SMPS. But for now, back to measurement.)

- Keep track of who attends each meeting and event by asking specific demographic questions during registration. SMPS can help you with reviewing your overall chapter demographic data:
- ✓ Primary job function (e.g., principal, vice president, marketing manager, technical, etc.)

✓ Primary discipline (e.g., engineering, architecture, construction management, environmental, interior design, etc.)

✓ Years as member; years in A/E/C industries; firm size; gender

When you begin with data such as benchmarks, you implement your activities and can track the impact over the course of the fiscal year. Monitor your progress toward participation/retention and adjust the plan accordingly. At intervals during the year and at year-end, you'll have new data to compare with the original data.

2. Let’s say a chapter’s goal is to increase the participation of members in the chapter’s social media initiatives. Your benchmark at the beginning of the year might be the number of followers on Twitter, friends on Facebook, participants in your LinkedIn group, etc.
- So, what’s next? You could create an online survey to gain member perspectives on, interest in, and use of social media. You could ask event attendees relevant questions by a show of hands to get an indication of social media interest. You could see who from your chapter follows SMPS and target those individuals for involvement? These are a few easy ways to gauge potential interest.
- As a result, you might offer an after-hours, hands-on social media 101 session or series of sessions. Perhaps you host these at a member’s office, invite social media super-users to lead the session, and track during the year the change in followers, friends, posts, etc. At the end of the year, you’re able to document the percentage increase in participation accordingly.

3. Your chapter wants to develop relationships with local colleges and universities to make them familiar with SMPS and give students the chance to learn about career opportunities in professional services marketing.
- Committee members and volunteers may develop a target list of schools to contact, assign volunteers, and schedule milestone dates to check progress.
- In this case, measurement may involve quantifying the telephone contacts and introductory meetings held with individual

schools or the number of presentations made to student groups, or conducting a before-and-after survey of awareness/interest from the school administrators. During the year and at year-end, progress toward the goal can be tracked/measured accordingly.

Summary

After implementing, evaluating, and measuring performance according to your action plan, the chapter board can aggregate the data and review, as well as discuss implications for the future. The data is valuable for several purposes, including:

- Preparing the board for future planning sessions
- Informing planning sessions
- Objectively evaluating overall chapter management practices as shared within the [Healthy Chapter Checklist](#)
- Communicating with chapter members during the year, while keeping them abreast of the chapter’s accomplishments
- Adding accomplishments to your professional resume (for example, “led membership committee in 200% increase in new members over two- year period” or “through leadership of outreach committee, achieved 100%
- Awareness of SMPS and A/E/C industries with four local colleges and universities, with 100% interest in internship program”)

YOU DID IT!

Just as this toolkit is full of ideas and samples, the Society is a broad network of talented professionals who can benefit from your efforts. Reach out to **SMPS HQ staff** when you need direction. Call on past chapter presidents who can offer advice and engage the Fellows who are a wealth of information and perspective.

Most importantly, celebrate your success. Too often, we're so focused on tomorrow's tasks, we forget to recognize successes today. Don't wait until the end of the year to recognize achievement. Celebrate successes along the way. Did you achieve a big goal? Bring in breakfast to the next board meeting. Recognize a committee for reaching a goal at the next chapter event. Add your achievements to your chapter's website. Go on a fun outing. No matter how big or small, by celebrating success along the way, you'll keep everyone excited and engaged.

CELEBRATE YOUR SUCCESS!



2022 TASK FORCE SUGGESTED RESOURCES

- <https://bizlockerroom.com/blog/>
- <https://go-strategies.com/blog/f/think-differently-about-your-strategic-plan>
- <https://www.ideo.com/blogs/inspiration/strategic-planning-how-to-get-started>



smps[®]
Society for Marketing
Professional Services
smps.org

625 N. Washington St Suite 302
Alexandria, VA 22314