

Assuring Strategic Focus in a Changing Landscape

Strategy Checklist

How can we assure the **strategic focus** of our organization in a rapidly changing landscape? This is an important question for leaders and board members in every sector. In this tool we offer a checklist of questions that leaders should ask themselves on a regular basis to make sure the organization is moving in the right strategic direction. Also consider sharing the checklist with your team and board members to engage them in strategic thinking about the organization.

Five Essential Questions

- During his remarkable career, Peter Drucker shared invaluable wisdom about managing organizations, including those in business, government, and the nonprofit sector.
- One of his most important contributions was defining what he called ‘*the five most important questions you will ever ask about your organization.*’¹
- At CHS we have applied the five questions to help dozens of nonprofit organizations optimize their strategies.

1 What is our mission?

Ask ‘what is our mission’ to assure your organizational mission is clear and relevant for the evolving landscape (or operating environment). It is often helpful to revisit ‘what is our mission’ after thinking more about questions 2-5.

- Why do we do what we do?
- What is our current mission statement?
- What are our emerging opportunities and challenges?
- Does our mission need to be revisited?

2 Who is our customer?

Ask ‘who is our customer’ to assure the organization has a clear and precise vision of who you aim to serve. Your organization’s *primary customers* are the people whose lives you are trying to change, e.g., clients, patients, or community members. The *supporting customers* include service partners, funders, and other organizations that help make it possible to serve your primary customers.

- Who are our primary customers?
- Who are our supporting customers?
- How might our customers change?
- Should we add or delete some customers?

3 What do our customers value?

Ask ‘what do our customers value’ to assure the organization understands the expectations of the customer groups it serves. This intelligence is essential for optimizing the ‘value proposition’ for each customer group.

- What do our primary customers value?
- What do our supporting customers value?
- Is there alignment between what our primary and supporting customers value?
- What additional knowledge do we need to gain from our customers?

4 What are our results?

Ask ‘what are our results’ to assure the organization is addressing the value expectations of your customers. If there are gaps between value delivered and value expected, this is a good time to revisit how you define your results.

- How do we define results?
- How do our results address what our primary customers value?
- How do our results address what our supporting customers value?
- What can we do to better meet the value expectations of our customers?

5 What is our plan?

Ask ‘what is our plan’ to assure the organization is directing its focus and resources to the right strategic aims. Strategic aims can be turned into action plans that identify specific goals, objectives, action steps, timelines, and resources for achieving results.

- What is our mission going forward?
- What is our value proposition for each of our customer groups?
- What services and supports will we provide?
- How will we turn our strategic aims into action?

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¹ *The Five Most Important Questions You Will Ever Ask About Your Organization.* Peter F. Drucker with Jim Collins, Philip Kotler, James Kouzes, Judith Rodin, V. Kasturi Rangan, and Frances Hesselbein. (San Francisco, CA: Jossey Bass, 2008.)