



THE UPSTREAM STRATEGIC PROCESS

*“Strategy without tactics is the slowest route to victory.
Tactics without strategy is the noise before defeat.”*

Sun Tzu

At Upstream Northwest, the purpose of strategy is to enable leadership to do the right things to advance the organization towards its envisioned future. This world class process incorporates the essential elements currently used by great organizations in strategy development. These elements include proper planning horizons, alignment with the organization’s core ideology (central purpose and core values), extensive internal and external analysis, and the development of key initiatives. The process is then strengthened and focused on tactical development which includes objectives, goals and action steps. Tactical development is based on the highly effective Blueprint for Excellence goal accomplishment process.

The end result is a real working document that becomes the map for the organization’s future success. The plan is then used interactively during the execution phase and reviewed at least annually to update for new goal generation. The result is a living strategic plan that leads to execution in doing the right things right.

THE IMPORTANCE OF VISION

Before any organization can effectively define its strategy, it must have a vision. It must know why they exist (what business are they in?) and what they want to become. According to Jim Collins in his study of enduring great organizations *Built to Last*, “A well conceived vision consists of two major components – core ideology and an envisioned future. A good vision builds on the interplay between these complimentary yin-and-yang forces: it defines ‘what we stand for and why we exist’ that does not change (the core ideology) and sets forth ‘what we aspire to become, to achieve, to create’ that will require significant change and progress to attain (the envisioned future).”

The organization may want to engage in the **Upstream Envision Process** to create their vision before moving on to the strategic process. Organizations that have this foundation in place are ready for the Upstream Strategic Process, which can be defined in three phases; preliminary, retreat and follow up.

PRELIMINARY

This phase encompasses all planning, participant selection, survey creation and analysis for use at the retreat and the final report.

EXTERNAL AND INTERNAL ANALYSES

We do this by conducting surveys with key leaders and/or stakeholders from the organization. The first is a scan of the external forces that will impact the organization and must be dealt with throughout the planning period. This examination of the economic, social, regulatory and technological forces facing the organization that will aid in the development of conclusions about the strategic assumptions that will underlay the plan we develop.

The second scan is an analysis of the organization's internal strengths and weaknesses. We do this through a prism that looks at the six fundamental areas of an organization that must be correctly designed to effectively carry out the organization's central purpose and advance towards its envisioned future. We must look at factors in: understanding the markets the organization serves now and in the future; matching products and services with those markets; marshalling the resources to support the products and services; developing the operational and management systems needed to operate and manage the organization now and in the future; and assessing the culture for fitness to the organization's mission and vision. This examination will help us identify the mega issues the organization must deal with in the next five years.

In each analysis, we conduct a full SWOT (strengths, weaknesses, opportunities, threats) review to capture the largest strategic perspective.

RETREAT

This phase involves an off-site retreat with selected participants for the development of the plan's key components.

BOLD INITIATIVE DEVELOPMENT

This process involves the development of up to 5 bold initiatives that can be accomplished in the next 5 years that will advance the organization towards its envisioned future.

OBJECTIVE IDENTIFICATION

Participants will identify a series of objectives will lead each initiative's accomplishment within the next 5 years. These objectives have target dates from one to five years out.

GOAL CREATION

For each objective, a series of goals will be created that will be accomplished within the next year that will lead to accomplishing the objective within the desired timeframe. These goals must be SMART (“Specific”, “Measurable”, “Achievable”, “Relevant”, “Timed or dated”).

ACTION STEPS

Action steps/tasks will be defined as necessary for the successful accomplishment of each goal. Each task should be dated and assigned to an individual or team for completion.

FOLLOW UP

This phase involves taking the work done from the previous phases and compiling them into a working report to be used for plan execution.

ACCESS TO GUIDES

As a part of this process, you will have open access to Upstream Northwest guides if needed to assist with strategy development questions that may arise during entire process.

PRICING

We understand undertaking a process such as organization vision represents an investment, not an expense. It will be transformational and have lasting value. Once we have had the opportunity to understand the needs, scope and logistics of the client, we will create a proposal with an all-inclusive price.

VALUE GUARANTEE

Satisfaction with Upstream Northwest services is fully guaranteed. If you are not completely satisfied with the value you receive, we will, at your option, either refund the fees paid under this agreement, or accept a portion of those fees that reflects your level of satisfaction.