Leading in Times of Uncertainty
A Strategy Toolkit for Social Impact Leaders

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Dear Nonprofit Leaders,

The global pandemic, social unrest, war in Ukraine and looming recession made us realize how unpredictable the world is. Many organizations have been challenged by delays and shortfalls in their programs and services in due to staffing challenges, supply shortages or rising energy costs.

So, what do leaders do in times of uncertainty? How do you stay focused on your mission with constant disruption?

In a recent blog post, Roger Martin, leading business management thought leader and author, describes the need for regularly revisiting your organizational strategy and implementation processes during times of uncertainty.

This toolkit includes templates that we have designed based on common strategy and planning concepts namely, PESTLE analysis, (Kaizen) Continuous Process Improvement and OKRs.

Use these tools to assess, prioritize, implement and evaluate new approaches in fulfilling your mission.

Our clients have used these when they need a quick plan to resolve sudden gaps in their programs or cost increases. Others have used these tools to help communicate with key stakeholders who may be impacted by your new plan.

We have a fillable, editable and sharable version of this toolkit in PowerPoint, which can be exported as a PDF and shared with stakeholders, email me at anasa@ilestrategies.com for a copy.

I hope this toolkit comes in handy. Please contact me with your feedback.

Thanks,

 Anasa Laude, Managing Director

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How to Use This Toolkit

Whether you lead a social venture, a nonprofit or even a small family enterprise this toolkit will help focus on aligning your operations and service model to external impacts while ensuring continued success.

For further reference read *Strategic Tools for Social Entrepreneurs by J. Gregory Dees.*

Assess external macro level issues influencing your organization.

Pg. 5 – PESTLE Analysis
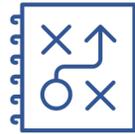
Revisit / realign your strategic plan.

Pg. 7 – Strategic Planning Framework

Assign roles for action planning.

Pg. 9 – Objectives and Key Results

Evaluate internal processes.

Pg. 12 – Process Improvement Framework

Prioritize incremental process change.

Pg. 14 – *PICK* Chart

Report process improvement outcomes.

Pg. 16 – *Process Improvement Report*

PESTLE Analysis Template

PESTLE analysis is an audit of external factors that influences an organization. Use this PESTLE analysis to gain an understanding of political, economic, social, technological, legal and environmental factors that might impact your organization.
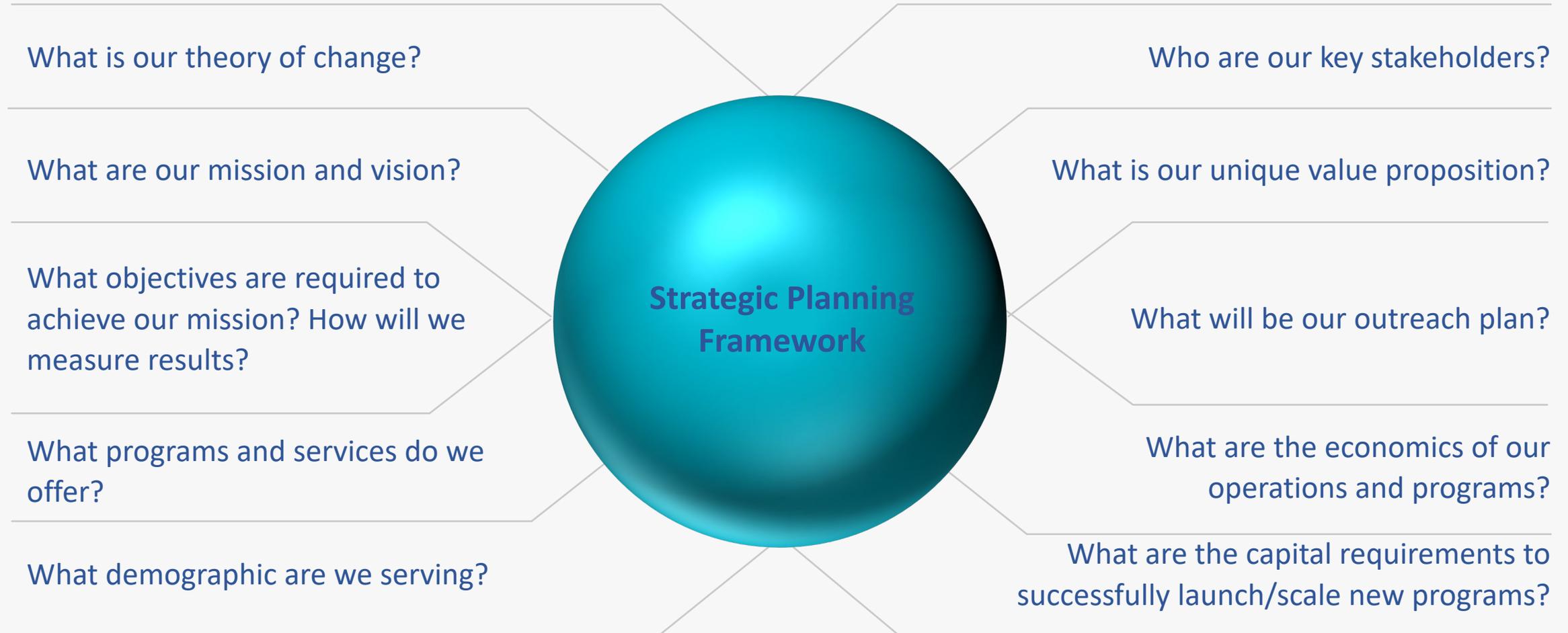
P	Political	**List issues related to elections, regulatory issues, public funding and infrastructure that may impact your organization and activities.**	List political issues here: 1. 2. 3.	List Political Opportunities here: 1. 2. 3.	List Political Risks here: 1. 2. 3.
E	Economic	**List factors such as inflation, economic growth and unemployment rates.**	List economic factors here: 1. 2. 3.	List Economic Opportunities here: 1. 2. 3.	List Economic Risks here: 1. 2. 3.
S	Social	**List cultural issues, trends in public discourse and demographic issues.**	List social trends here: 1. 2. 3.	List Social Opportunities here: 1. 2. 3.	List Social Risks here: 1. 2. 3.
T	Technological	**List technology, data and Artificial Intelligence access, barriers and risks.**	List technological advantages and challenges here: 1. 2. 3.	List Tech Opportunities here: 1. 2. 3.	List Tech Risks here: 1. 2. 3.
L	Legal	**List contractual, regulatory, labor, health and safety considerations.**	List legal responsibilities / risks here: 1. 2. 3.	List Legal Opportunities here: 1. 2. 3.	List Legal Risks here: 1. 2. 3.
E	Environmental	**List impact of climate change, and impact of your activities on the environment.**	List environmental factors / issues here: 1. 2. 3.	List Environmental Opportunities here: 1. 2. 3.	List Environmental Risks here: 1. 2. 3.

Strategic Planning Framework

Whether conducting strategic planning in-house with staff or engaging a facilitator, use these guiding questions to prepare your team.

The answers to each question should be relevant, concise and focused.

Strategic Planning Framework – 10 Questions

What is our theory of change?

Who are our key stakeholders?

What are our mission and vision?

What is our unique value proposition?

What objectives are required to achieve our mission? How will we measure results?

Strategic Planning Framework

What will be our outreach plan?

What programs and services do we offer?

What are the economics of our operations and programs?

What demographic are we serving?

What are the capital requirements to successfully launch/scale new programs?

OKRs- Templates

OKR, which stands for **Objectives and Key Results**, is a planning and goal setting technique popularized by Intel and Google. Created by business guru Peter Drucker and popularized by Andy Grove, founder of Intel OKRs represent goals and define the measurable steps you'll take towards achieving those goals. They're typically used to set short-term goals but can also be used for annual planning.

For small organizations, with less than 250 employees, a simple form that is updated regularly with key metrics entered manually can work just fine. . I've recreated one as a PowerPoint slide to make it user-friendly, easy to edit, fill and share. Save them as PDFs to share with board members, community advisory groups and other stakeholders.

Tips for Preparing to use OKRs

1. Shoot for the stars and land on the moon. - Goals should be very ambitious, yet achievable. The idea is to push yourself and your team in reaching new heights and propelling the organization forward. To keep very one motivated small wins along the way.

2. Use the OKR planning process to provide professional development opportunities – a key driver of retention - to staff.

3. Involve the entire team in planning. Everyone's OKRs should be visible and accessible.

4. OKRs are part of action planning and should align with higher level organizational goals.

5. Use canvas and tables/ spreadsheets to track results.

6. Use OKRs during meetings to facilitate progress reporting.

Use the OKR table, to list departmental or organizational objectives all in one place. Use the form on page 18 for individual assignments. We recommend you use both, to facilitate communication, accountability and transparency. For further references read *Measure What Matters* by John Doerr.

OKR – Individual Canvas

Objective

Key Result 1

Key Result 2

Key Result 3

OKR – Team Template

Objective	Key Result (up to 3)	Owner	Team	Progress	Status
What do you want to accomplish?	How will you accomplish this objective in a way that is measurable?	What is the name of the person who will implement/oversee these key results?	Insert team or department of the Owner.	Insert progress metrics to report.	Include notes on opportunities and threats impacting outcomes thus far.

Process Improvement Framework

On the next page is a process improvement framework that we have adapted based on our experience serving nonprofit teams. This is a spin on a business process improvement framework popularized by the manufacturing industry, namely Toyota.

Process mapping sounds complex, but it doesn't have to be. If you are dealing with an urgent issue and need a timely, cost-effective solution a simple chart outlining key tasks and roles involved in a particular process.

For further reference read *Lean Kaizen: A Simplified Approach to Process Improvements* by George Alukal *or Gemba Kaizen A Common-sense, Low- Cost Approach to Management by Masaaki Imai*.

Suggested Use:
You can white board your process or use low-cost online tools like MS Visio, which is intuitive and simple to use.

As a team you can write down each step in the process, *literally every single step,* and then talk through the challenges at each step. It's important for all team members involved in this process to be present during the meeting. More than anything, process mapping is just a tool for facilitating team communication and information exchange which is the most important aspect of this exercise.

Find Incremental Solutions

Changes should be small and manageable. If the changes are too drastic, it can end up exacerbating the problem and contribute to more bottlenecks and could end up demoralize team members.

Instead of targeting major shifts, find easy and no-cost / low-cost changes. Based on my experience the best incremental changes usually involve better communication, information exchange and clearer articulation of assignments and roles.

Track and Frequently Evaluate Progress
However, small the fix, success requires consistency and check ins. Even if the change includes a minor task such as a weekly email update, that task must be scheduled and tracked just as you would any other team role.

Report Frequently

Finally, use the Process Improvement Report Canvas as an overview of the process improvement effort and to keep all stakeholders informed.

Process Improvement Framework

- Define the problem or opportunity.
- Collect data and information relevant to the problem.
- Conduct an analyses of solutions to date.
- Define success metrics .

1.
Plan
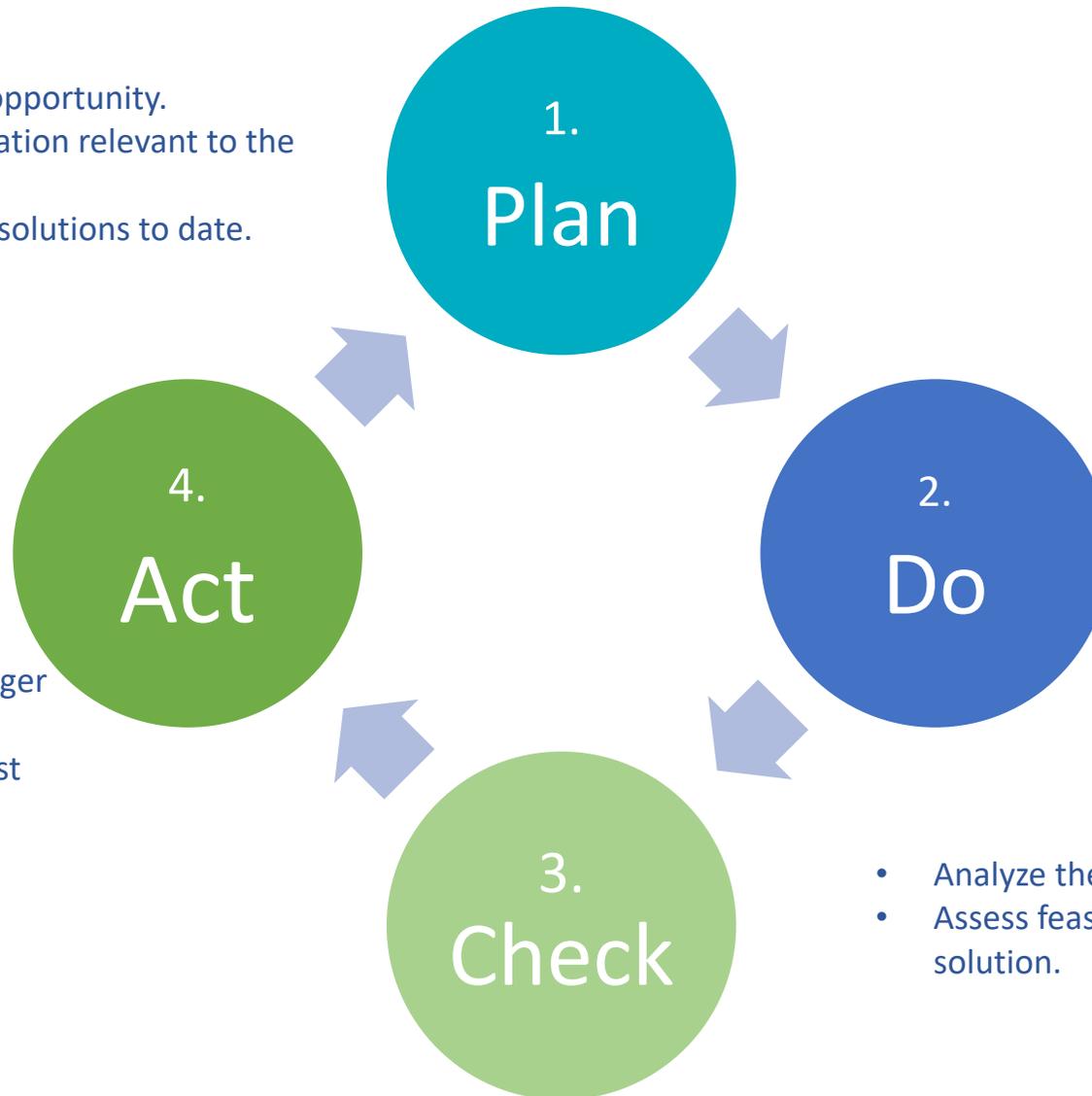
- Pilot a solutions on a small scale.
- Track data based on success metrics during the pilot.

2.
Do

4.
Act

- Implement solution at a larger scale.
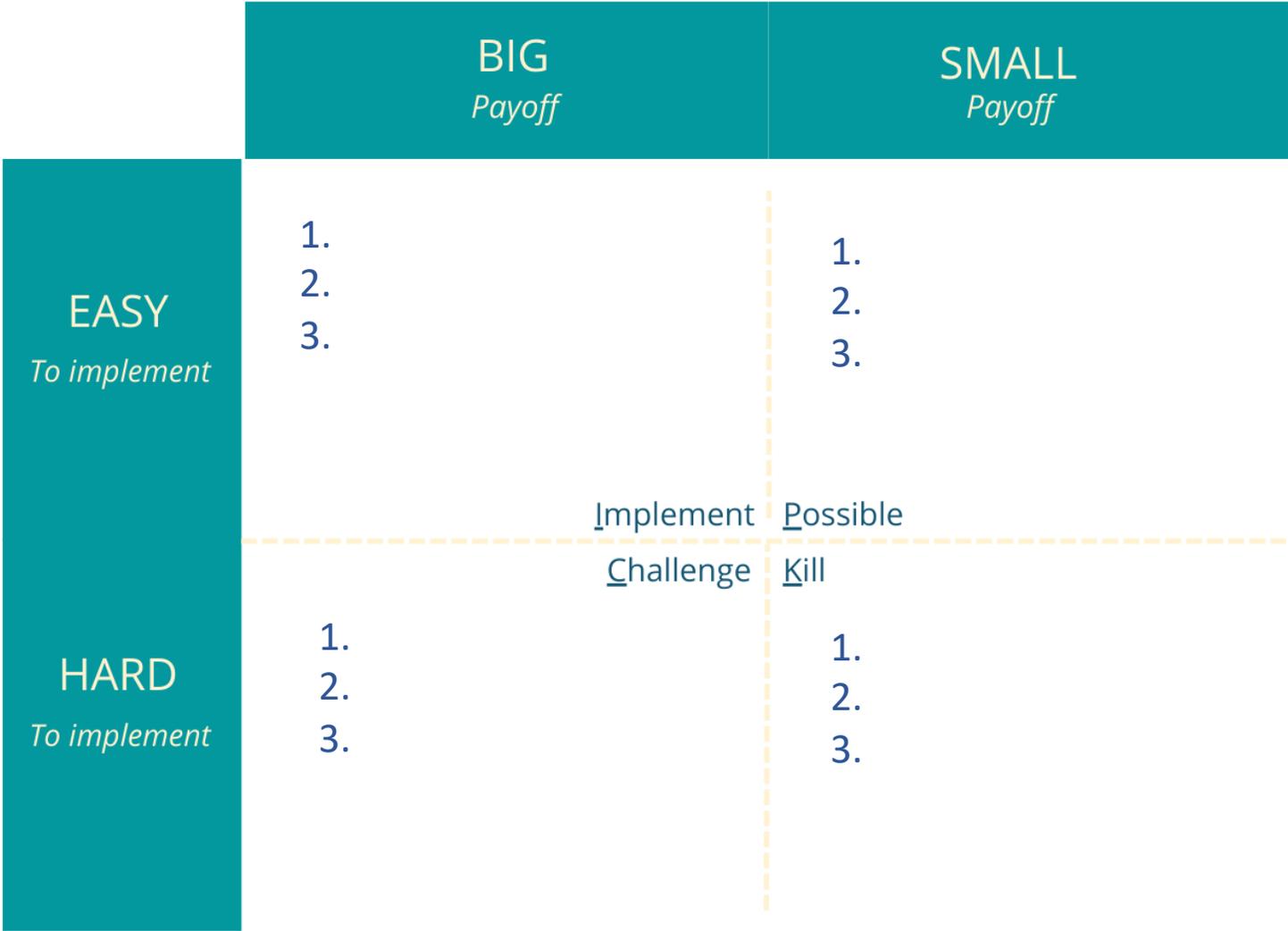- Continuously test and adjust solution as needed.

3.
Check

- Analyze the results of the pilot.
- Assess feasibility and scalability of solution.

PICK Chart for Prioritizing Process Improvement

Suggested use:

Use the PICK Chart to prioritize new initiatives for process or program improvement. The PICK chart, which is an acronym for *Possible, Implement, Challenge* and *Kill* will help you rank each idea based on the payoff and the possibility of implementation.

Process Improvement PICK Chart

	BIG *Payoff*	SMALL *Payoff*
EASY *To implement*	1. 2. 3.	1. 2. 3.
	Implement	Possible
	Challenge	Kill
HARD *To implement*	1. 2. 3.	1. 2. 3.

Tip: Double click inside each box to insert ideas based on level of difficulty and payoff.

Process Improvement Report Canvas

Suggested use:

The Process Improvement Report Canvas is helpful for visualizing incremental revisions to your processes. The canvas will provide key stakeholders with an overview of the of the problem, solutions and metrics or data you plan to use to guide decisions and evaluate results.

- Use this template to create a simple report post project implementation. Export as a PDF to share with clients, staff, board and key stakeholders, to display online and in print at key locations.

- Create multiple reports for each problem addressed.

- Repeat the process every 1-3 months to sustain continuous improvement of operations and programs.

- Use ten words or less per section.

- Use simple graphs in the large boxes to illustrate before and after scenarios.

- Use the boxes on the right to check off each issue addressed during this process.

Process Improvement Report

Problem	Data Source	Solution

Before	After
(insert image or graph)	(insert image or graph)

Issues Addressed

	Improve client outcomes
	Improved communication
	Improve stakeholder engagement
	Increased funding
	Improve compliance
	Improve safety
	Improve clarity
	Reduce costs
	Reduce disruption
	Reduce bureaucracy
	Reduce Redundancy

Working on a new strategy with your team?

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