



Overview

Define Strategy
Strategic Framework
Vision/Mission
Goals
Tactics
Implementation (OKR's)
Correction
Table Exercise

1980 – Porter's Definition

A broad formula for how a business is going to compete, what its goals should be, and what policies will be needed to carry out those goals

1988 – Mintzberg's Definition

A directed course of action to achieve an intended set of goals

Strategy is...

A systematic program that identifies and executes actions to achieve an intended set of goals

Strategic Framework

Vision/Mission
Goals
Tactics
Implementation
Correction

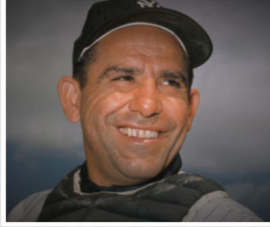






Vision – long term success

*“If you don’t
where you’re
going, you
might not get
there”*





Vision - Example



*To bring inspiration and
innovation to every
athlete in the world*

Vision - Example



To be earth's most customer centric company, a place where people can come to find and discover anything they might want to buy online.

Vision - Example



A world where everyone has a decent place to live

Vision Example



To be a world-class, values-centered university

Mission

The organization's present capabilities and core activities

- "who we are"
- "what we do"

**You
Are
Here**

Mission Example



SMU

Southern Methodist University will create, expand, and impart knowledge through teaching, research, and service, shaping world changers who contribute to their communities and excel in their professions in a global society. Among its faculty, students, and staff, the University will cultivate principled thought, develop intellectual skills, and promote an environment emphasizing individual dignity and worth. SMU affirms its historical commitment to academic freedom and open inquiry, to moral and ethical values, and to its United Methodist heritage.

Mission Example



To educate individuals to think and act as ethical leaders and responsible citizens in the global community

Vision/Mission – Exercise

Safety Program

You have been assigned to develop a safety program for your department

Vision/Mission – Exercise

Safety Program: Draft a vision statement

Some questions to ponder while drafting your statement:

- *What is the purpose of a safety program?*
- *What would a perfect safety program look like?*

Goals

- *Performance targets an organization must achieve in order to reach the vision*

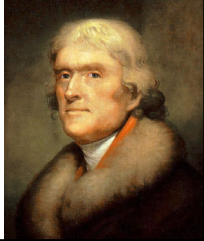
Specific
Measurable
Attainable
Relevant
Time bound



Goals

“Nothing can stop the man with the right mental attitude from achieving his goal; nothing on earth can help the man with the wrong mental attitude.”

Thomas Jefferson



Goals - Examples

Reduce Utilities fuel budget by 10% in 2017

Complete 95% of PM's in 2017

Increase the customer satisfaction rating to 90 or greater in the second quarter

Goals – Exercise

Safety Program:
Create a performance target

Some questions to ponder:

- What can we measure to determine the performance of our safety program?*
- Are there absolute/relative metrics?*
- What level of performance must we achieve?*
- Is it SMART?*

Tactics

- *The selected approach to achieve organizational objectives*
- *Based on specific advantages or disadvantages of current situation*

Tactics

If you know the enemy and know yourself you need not fear the results of a hundred battles



Tactics - Examples

- Preventive maintenance vs run-to-failure*
- Xeriscaping vs turf*
- Zone maintenance vs centralized maintenance*
- Sub-metering vs district metering*
- Cogeneration vs local utility*
- Outsourcing vs Insourcing*
- Standardization of equipment vs lowest cost*

Tactics - Exercise

Safety Program:

Pick between the following tactics and explain why that is the best approach for your organization

Use our own employees to develop the program or hire a consulting firm

Implementation

Specific tasks to attain goals

- *Sequenced*
- *Projected impact on performance*



Facilities Management Department 2019 Action Plan				Stopped Behind Schedule On Schedule Complete				Responsible Party
Strategic Focus	Objective	Key Results	Target Date (Mo/Yr)	Mar '19	June '19	Sept '19	Dec '19	
1 Safety								
1.1 Establish formal safety policies for critical processes								
	1.1.1	A policy for working in confined spaces is written and distributed to all Facilities personnel	3/19					Leslie Knope
	1.1.2	A policy for maximum shift duration is written and distributed to all Facilities personnel	3/19					Ron Swanson
1.2 Provide comprehensive safety training to employees								
	1.2.1	Determine mandatory and recommended safety training	1/19					Jerry Gergich
	1.2.2	Hire a safety training company and schedule all training	4/19					Tom Haverford
	1.2.3	Complete the training plan for 2019	12/19					Andy Dwyer
1.3 Ensure employees have appropriate PPE								
	1.3.1	Assess the current inventory and distribution process for PPE with a list of corrective actions	4/19					Ron Swanson
2 Customers and other stakeholders								
2.1 Improve Customer Satisfaction								
	2.1.1	Revise the customer satisfaction survey to provide standardized data and more timely feedback. CMMS automatically generates surveys on the "finish date" and managers are automatically notified of any negative responses.	2/19					Jerry Gergich

Implementation - Exercise

Safety Program:

List two tasks for your program

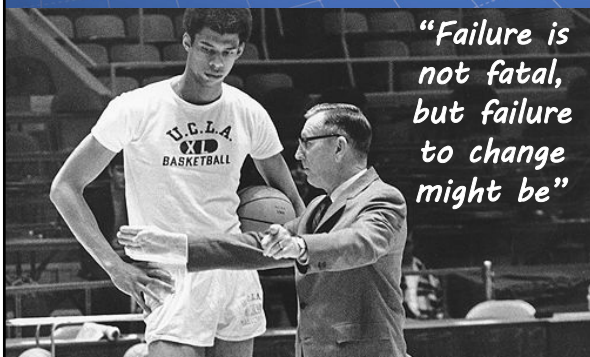
Questions to ponder:

- *Who's the best person for each task?*
- *When do we need to have each task completed?*
- *Is there a particular order of the tasks?*

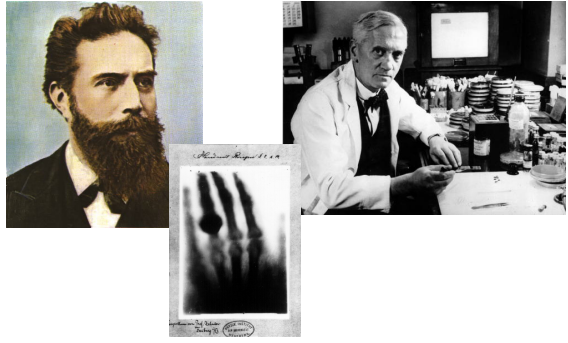
Correction



Correction



Correction Examples



Correction - Exercise

*Safety Program:
What could go wrong?*

Questions to ponder:

- *Is the program achieving the original purpose?*
- *What are our metrics telling us?*