

Strategic and Operational Planning

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Our goal... Help organizations examine and adjust their business models and create the alignment and approaches that help them better fulfill their missions.

Our philosophy... We recognize that non-profits are challenged to run like a business and yet honor the varied interests of priority constituents and leaders. We believe that to evolve and grow, our clients must be willing to chart new direction and adapt their operating paradigms and practices to ensure success.

Our focus... We emphasize a unique balance of vision, strategy, and pragmatic execution. We know non-profits must 'fix the plane and fly it at the same time', so the intended outcome of our work is to equip our clients to understand and articulate their evolved direction and to know and embrace the requirements of successful execution. For this reason we steward both the strategic creative process and the initial operating plan so that clients can get started immediately.

Now Scheduling for
2020 AND 2021?

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Core Competencies and Services

Knowledge and Experience: Grounded in 25 years of active non-profit leadership, we understand the often complex constituent dynamics and the requirements of creating change within them.

Process Development: A single process does not work for all. We are skilled at understanding core issues, and creating a process that ensures the buy-in of key constituents, informed decision making, and timely follow-up to ensure strong execution.

Innovation: We boldly urge organizations to address the paradigms that keep them from growing, and help them manage risk as they make challenging decisions.

Artful Facilitation: Our retreat, committee, and one-on-one engagement keep the process moving and commitment growing. Our approach ensures all voices are heard and consensus formed toward meaningful change.

Communication: We provide formal reports of strategic development and operational imperatives to ensure all are aware of progress and potential implications, and a final plan document at the conclusion that contains 1st year execution benchmarks and requirements.

“ We hired Tim to help us through our strategic planning process. He earned his fee the first day he worked with us. Within a very short amount of time, we had a new vision and mission statement. Tim stayed within our budget and our time frame and we ended up with an outstanding result. The strategic plan we ended up with is being used multiple times a day by our entire organization. Tim helped us to ensure our plan was relevant, time bound and challenging. I look forward to working with Tim again.”

DAVID NICOLE
President & CEO of United Way of Allen County

Enhancing Human Performance to Drive
Business Results™



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Addressing Commonly Asked Questions

What is Our approach?

We understand that every organization has unique circumstances and constituencies, so we do not advocate a single stock approach to the strategic planning process. Our engagement generally consists of the following five phases:

Assess

- Fully understand the client situation and objectives
- Interview varied constituents to affirm interests
- Interview staff to assess operational state-of-being

Design

- Determine the best process for your situation
- Ensure environmental scan is in place
- Ensure heavy constituent input throughout

Implement

- Balance facilitated insights with operational implications
- Communicate progress to all constituents
- Address challenges and barriers to buy-in

Finalize

- Obtain Board approval and confirm constituent buy-in
- Design high-level or detailed operational imperatives
- Begin operational phase

Execute

- Establish 1st year deliverables plan; multi-year plan available, if desired
- Provide training and reinforcement of skills needed to succeed
- Provide on and off-site check-in's with all relevant constituents

Is it better to enlist a local or outside organization?

This is an important question and your supporters and co-workers will have varied opinions. There are many factors that go into this decision and at times we have encouraged organizations to use a local facilitator after understanding their needs and situation. In order to make the best decision, organizations should first answer the following as best you can.

- To what degree is our vision for our future different than today's?
- What level of change is needed to attain this vision?
- What type of expertise do we need most at this time?
- What will ensure a trusted and credible process and result?

When is the time to think these questions through?
If you are reading this document, the time is now!

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“United Way of the Southern Tier has engaged the services of the Strategic Enhancement Group in areas of utmost importance to the success of our mission, including the implementation of our completed strategic plan. If subject matter expertise is what you're looking for Strategic Enhancement Group delivers.”

STEPHEN M. HUGHES

President & CEO of United Way of the Southern Tier

“Tim was the consultant for Hastings Young Life during its strategic planning initiative. He brought significant value to the mission. I've worked with other consultants in the past but I've never had anyone combine the planning, facilitation, contribution to the discussions and flexibility as well as he did—all with a very personal touch that the entire team responded to. Tim knows how to keep a team focused and deliver specific and measurable goals.”

BRENT KLEFFMAN

Partner/Attorney at Peterson, Logren & Kilbury, P.A.



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