

“Every organization will have to become a change leader. You can’t manage change. You can only be ahead of it. You can only make it.”

Peter F. Drucker, Leader to Leader, Fall 2000

A Highly Visible and Tangible Road Map to the Future

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The next five to ten years will be a period of intense change and challenge for associations. For many, this will require risk-taking and radical innovation. For most, it will also require redesigning the organization’s structure, process and culture and adopting what Peter Drucker calls “the discipline of planned abandonment.”¹ You cannot create something new until you let go of the old.

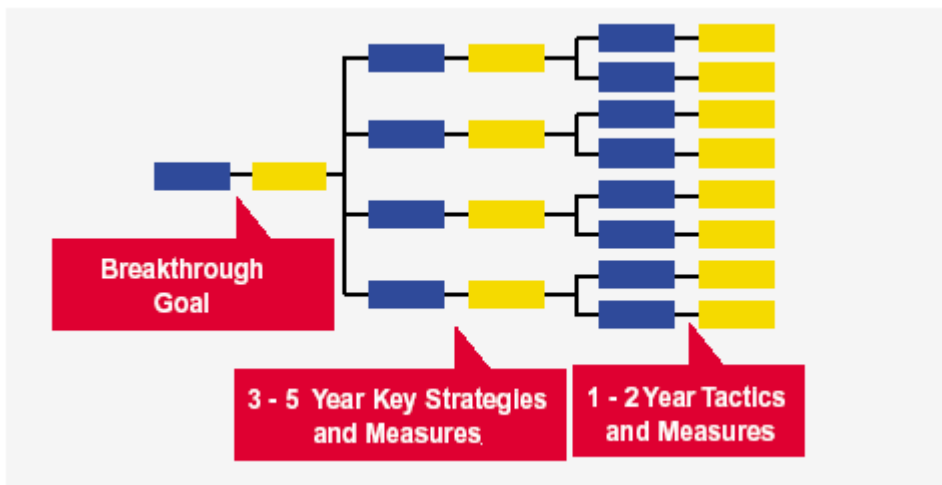
Transforming an individual membership society from a product-based, process-driven organization to a knowledge-based, market-driven one will require new tools and a new way of thinking and planning.

More than ever before, Board and staff will need to be aligned with the strategic goals of the organization and use member/customer input, environmental trends and other key information inputs to make market-driven decisions and manage organizational priorities.

A Tangible Structure for Facilitating Change

The principal engine of the transformation process is a planning and management system called Master Planning™, which is based on a quality management system known as hoshin kanri. Master Planning™ is a powerful strategy development tool that focuses an organization and aligns its various functions and elements for effective implementation. One feature of the system is the provision of continuous measures of progress against the plan.

The transformation process serves as a tangible structure for facilitating organizational change by creating a highly visible, measurable and focused roadmap for the future that may look something like this:



Benefits of Transformation Master Planning

Transformation Master Planning can:

Transform the Board and staff by creating...

- Enthusiasm for change and commitment of time and effort to the process;
- A focused understanding of and commitment to the association's members and customers; and
- Improved decision-making skills and core competencies.

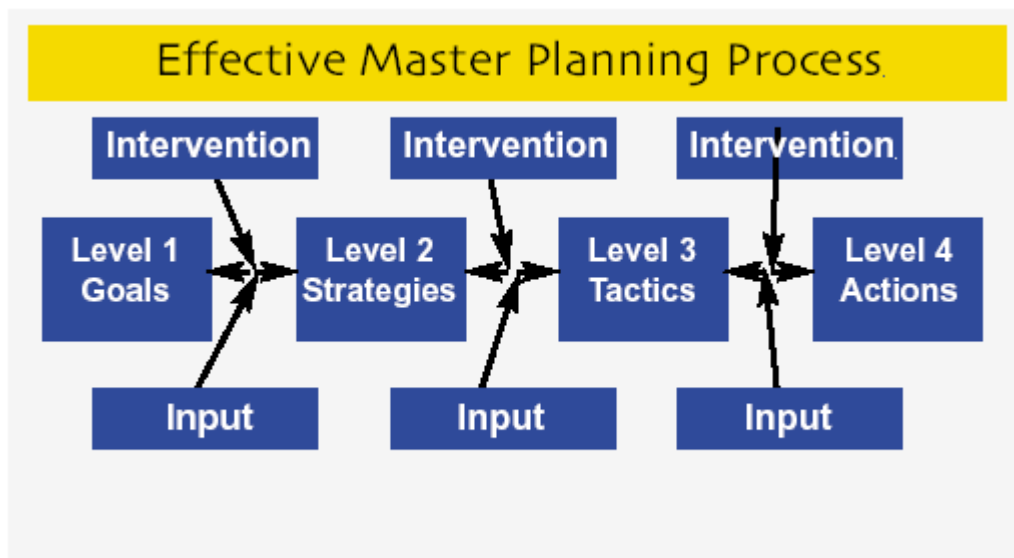
Transform the organization by...

- Integrating strategic and operational goals to ensure alignment between Board and staff activities;
- Improving member/customer satisfaction through customer-focused product development and improved speed;
- Laying the groundwork for successful branding; and
- Serving as a tool to assess the need for change in organizational structure and staff competencies.

A Multi-Disciplinary, Flexible Process

The Transformation Master Planning process integrates five key activities to effect the transformation. They are:

- Environmental Scanning
- Hoshin-based Master Planning™
- Market Research
- Organizational Development Interventions
- Skills Training



These activities are interwoven throughout the planning process so that it is continually enriched by information inputs and interventions that provide direct support to the people involved in the process. This process, coupled with well-focused change management activities, can and will effectively communicate that “business as usual” is no longer the association’s philosophy.

The Transformation Master Planning process offers considerable flexibility in how the transformation planning is implemented, depending on the size of the organization, budget and staff resources.

The Transformation Master Planning process that is the most beneficial for a particular organization is finalized in conjunction with the planning team before any activity begins.

Getting Off to a Good Start

Arguably the most critical phase of the transformation planning process is the preparation prior to implementation. This includes a preliminary assessment of the current situation to provide the context for embarking on a change process. This internal scan provides a quick qualitative, objective assessment of those things that are working well in the organization and those that are not working well or need fixing.

A readiness assessment is then conducted to evaluate organizational readiness for change and identify strategic opportunities and challenges that may impact the transformation process. The end result is a “10,000-foot” assessment of the organization’s health.

If the results of the readiness assessment indicate that the conditions are favorable for the organization to begin the transformation planning process, the final process is designed in partnership with the planning team.

If the organization is not ready to begin the transformation process, immediate next steps are developed with the CEO. These may include organizational development interventions such as team effectiveness profiling, communication planning, executive coaching or developing a smaller scale transformation process using one department or function (e.g. marketing) to demonstrate the benefits of transformation planning.

Marketing Partner’s role is partly that of guide and facilitator, partly that of teacher and trainer, and partly that of servant to the process—in terms of organizational development interventions, when required, and the provision of market research and other support as needed.

Determining the Focus

To get the planning process started, a Leadership Workshop consisting of Board and senior staff is conducted to set the strategic direction for the remainder of the Transformation Master Planning activities.

The workshop develops the strategic vision for the organization by:

- Creating or affirming mission, vision and values statements;
- Developing a single breakthrough goal (7-10 year, if appropriate);

Ten Tips for a Highly Effective Transformation

1. If it doesn’t fit the plan, don’t do it.
2. Don’t neglect the interventions and inputs. They are integral to the process.
3. Learn how to do your own fishing.
4. Abandon silos.
5. Listen to the voice of the customer.
6. Team goals = individual performance measures.
7. Feed the plan continuously and you’ll never need to create another strategic plan again.
8. Change is constant in the new economy. Embrace it.
9. Nurture the Board’s partnership in the plan.
10. Be willing to learn new skills and improve current competencies.

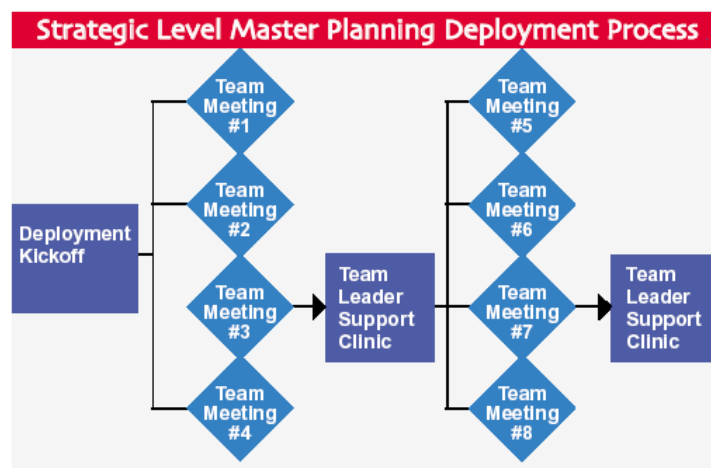
- Developing up to four strategic goals and measures; and
- Conducting an environmental scan to understand where the organization is now, where it would like to be and what needs to be done to get there.

The workshop also identifies the need for any baseline market research in support of the strategic goals and measures, uncovers data gaps and addresses any issues that may impact successful deployment of the process.

Strategic Level Master Planning

To develop the strategic level of the Master Plan, teams are organized around the four to five strategic goals developed during the Leadership Workshop. The teams are charged with developing key strategies and measures, plus a list of possible operational initiatives that will serve as the basis for later operational level planning.

Team Leader Support Clinics are conducted to assess progress with activities and address catchball issues.



Catchball is the term applied to the dialogue—and sometimes negotiation—which occurs after a deployment handoff between planners at two levels of detail.

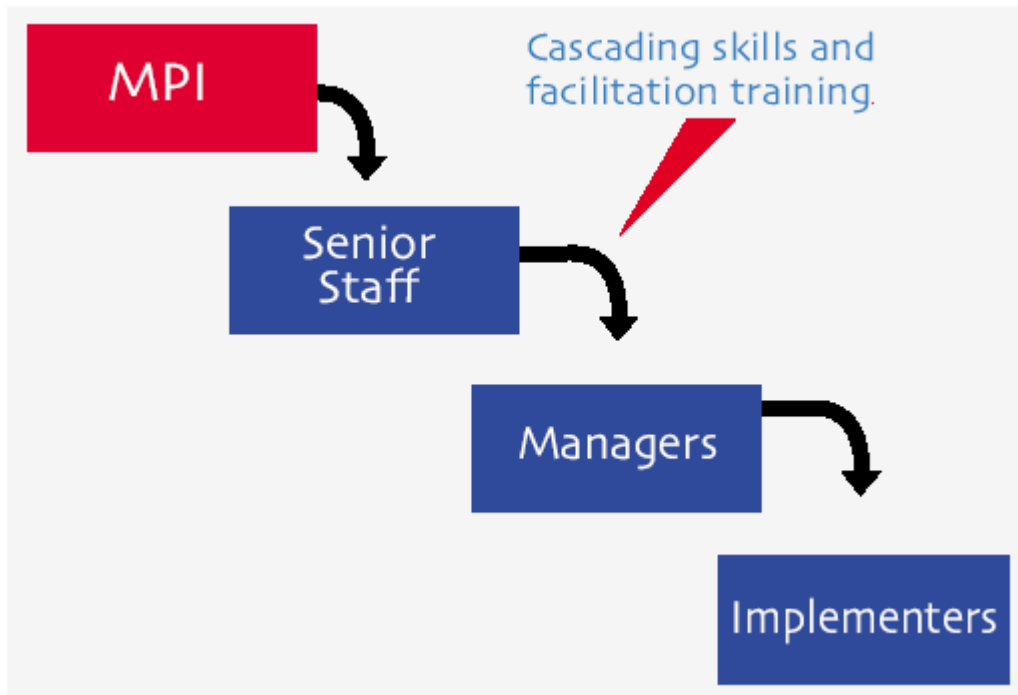
The Support Clinics address such topics as:

- Introduction to Master Planning tools and techniques;
- Theoretical instruction on the role of teams in knowledge-based organizations;
- Team-building exercise and/or team-effectiveness profiling;
- Psychological profiling (e.g., Meyers-Briggs™, MBT™); and
- Other skill training and organizational development interventions identified.

Operational Level Master Planning

Once the Board has approved the strategic level Master Plan, an all-staff, kickoff event signals a new way of developing the operational plan that will support implementation of the Board-approved key strategies and goals.

Managers and other staff who will be key implementers of the operational plan are brought into the process at this time. A planning session repeats the cycle of learning experienced by the Team Leaders during the strategic level planning. Team Leaders then facilitate development of up to four operational initiatives for each of the key strategies. A parking lot of one-year tactics will be compiled during the team meetings and further developed in the next phase of the process.



Market research execution may also be conducted at this time if planning and budgeting for these activities has been completed. Other organizational development interventions such as change management, culture shift, monitoring or leadership training may also be appropriate.

Ongoing, Integrated Master Planning

The final phase of the transformation master planning process should not be viewed as the end, but rather the beginning of a new way of thinking, acting and behaving.

During this phase, the planning process is further deployed to teams organized around the operational initiatives. These teams develop the annual plan of tactics, quarterly actions and measures. The annual Master Plan is integrated into the organization's budget cycle and is continuously monitored and refreshed, based on accomplishment of tasks and achievement of milestones. This is what keeps the plan alive and prevents the Master Plan from becoming another strategic plan that sits on a shelf.



The Transformation Master Planning™ Process culminates with a workshop to celebrate the accomplishments of the teams and foster adoption of a knowledge-based, market-driven philosophy.

When all phases of the process have been completed, the organization should be effectively positioned to begin the transformation to a knowledge-based, market-driven association and to meet the challenges of the twenty-first century. MPI

About the Authors

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Marketing Partners, Inc. is a strategy and business services organization serving individual membership societies and associations, as well as consumer packaged goods, consumer durable and health care clients across the United States. The firm's focus is on business improvement—principally in three areas:

- *Customer Focus*, which includes using market research to create market-driven products and processes designed to gain and retain customer and member loyalty;
- *Organizational Advancement*, which views the organization itself as the product and focuses on developing both strategy and organizational capabilities including custom-designed strategic and breakthrough planning processes; and
- *Revenue Enhancement*, which employs both fund raising and marketing tools to identify and tap new sources of revenue.

If you would like more information about how branding might benefit your Association or Society, or more information about any of the services Marketing Partners offers, please contact Viki Gudas in St. Joseph, MI, (269) 983-0016, (hq@mpicompanies.com).