

1-Page Strategic Plan

Connecticut's Strategic Employment Plan

Medicaid Infrastructure Grant

Date: October 2006

Strengths	Weaknesses	Opportunities to exceed plan	Threats to making plan
1 Person Centered Planning	1 Attitudes	1 Employer Readiness for Change	1 Attitudes/Low Expectations
2 Key Staff	2 Transportation	2 Technology and Internet	2 Liability Concerns
3 Momentum:Systems Change	3 Complexity/Gaps in Benefits Programs	3 Business/Community Partnerships	3 Accommodation Concerns
4 Medicaid Buy-In	4 Transition Linkages	4 Job Growth/Economy	4 Lack of Active Engagement
5 Individual Employment Support	5 Time Limited Employment Supports	5 Large Scale Corporate Initiatives	5 Need for Training
6 Evaluation	6 Lack of Systems Coordination	6 Personal Support Systems	6 Lack of Private Transportation
			7 Struggle: Dependency and Security

Core Values/Beliefs	Purpose (Why) 10 years Purpose Why?	Key Thrusts/Capabilities 3-5 years Priorities 3-5 year Priorities	Theme 1 year Strategies To Achieve Priorities	Goals Annual Priorities Key Initiatives Annual Priorities	Actions (how) Quarterly Rocks and Accountability Quarterly Priorities: First Quarter	Baseline Historical
<p>Full participation in community includes opportunities for employment.</p> <p>There must be a mutual benefit to the employee with a disability and the employer.</p> <p>Individuals have the right to choose their employment and their employer.</p> <p>Employers have the right to choose whom they hire.</p> <p>Success is defined by the individual.</p> <p>The individual's employment choices and resulting services and supports should be based on individual person centered designs.</p> <p>Anyone, regardless of disability, must have the opportunity to participate in the labor force and have the right to fair treatment.</p>	<p>To maximize opportunities for self-sufficiency and full participation.</p>	<p>1 School to Work Transition</p> <p>2 Stakeholder Education</p> <p>3 Recruitment, Employment & Retention</p> <p>4 Transportation</p> <p>5 Technical Assistance</p>	<ul style="list-style-type: none"> Partner with local communities and business; Coordinate state level policy change, initiatives and resources with local level initiatives; Share decision-making with stakeholders; Assure data driven change; Expand definition of disability to include the aging workforce. <p>Annual Theme Name</p> <p>Preparation</p> <p>Celebration/Reward</p> <p>Stakeholder Recognition Events</p>	<p>School to Work Transition</p> <p><i>Curriculum based work opportunities; Integration of Assistive Technology that can follow to work; Understanding of Benefits; Opportunities for Mentoring; Ensure IL needs are met</i></p> <p>Stakeholder Education</p> <p><i>Outreach campaign to increase expectations for people with disabilities in achieving career potential including video, printed materials, media</i></p> <p>Recruitment, Employment, Retention</p> <p><i>Central Information System for Employers; Outreach Campaign to address insurance and liability concerns; Innovative strategies for workplace accommodations</i></p> <p>Transportation</p> <p><i>Improve access to transportation through innovative initiatives including a person centered voucher system</i></p> <p>Technical Assistance</p> <p><i>Coordinate state level resources including systems; Address gaps in state level policy including healthcare policy; Support local level initiatives with technical assistance</i></p>	<p>October - December 2006</p> <p>~Establish workgroups for each of the annual priorities including:</p> <ol style="list-style-type: none"> School to Work Transition, Stakeholder Education, Recruitment, Employment and Retention, Transportation, Technical Assistance/Community Implementation. <p>~Establish additional workgroup for Evaluation activities.</p> <p>~Establish workgroup meeting schedules and organizational structure for steering committee;</p> <p>~Determine design of pilots and relevant policies for Connecticut based on literature review at a workgroup level.</p> <p>~Develop and distribute RFP for local level pilots to demonstrate priority-based innovation at a community level.</p> <p>~Design state level evaluation plan.</p> <p>~Establish baseline data at a state level.</p> <p>~Design structure and methods for collecting and storing cross-agency data.</p>	<p>Baseline Measures</p> <p>~# of people competitively employed, statewide and in each of the local demonstration sites</p> <p>~% of individuals with disabilities in competitive employment compared to % of individuals without disabilities in competitive employment</p> <p>~employer attitudes</p> <p>~job seeker attitudes</p> <p>~customer satisfaction relative to the interventions for employers and employees</p> <p>~current employment processes</p> <p>~state data collection capacity</p>

Rockefeller Habits Checklist

Person: _____

Date: _____

Everyone aligned with #1 thing that needs to be accomplished this quarter to move company forward

- 5 priorities (Rocks) are identified and ranked for the quarter
- A Critical Number is identified and aligns with the #1 priority
- A Quarterly Theme is established that brings the key priority/Critical Number alive
- A scoreboard for the Critical Number is posted and Theme announced
- All employees know what the Celebration/Reward will be

Communication rhythm is established. Information moves through organization accurately and quickly

- All employees are in some kind of a daily and weekly huddle
- Huddles cascade from senior management to frontline or visa versa

Every facet of the organization has a person assigned with accountability for ensuring goals are met

- Income (P&L), Cash Flow, & Balance Sheet statements have persons assigned to each line item
- An accountability chart has been created

Ongoing employee feedback and input is systematized to remove obstacles and identify opportunities

- Employee hassles/ideas/suggestions/issues are being collected weekly
- There is a systematic process for addressing issues and opportunities
- Thank You cards are being written every week by senior management

Reporting and analysis of Customer Feedback data is as frequent and accurate as financial data

- All employees are involved in collecting customer data
- There is a person assigned accountability for customer feedback
- All senior leaders communicate with at least one customer weekly

Core ideologies are "alive" in the organization

- Core ideologies are discovered and defined
- Stories are being shared of employees who represent the ideologies
- Core ideologies are included in appraisal and recognition processes

Clear understanding of the firm's market position drives strategic planning and sales and marketing

- Brand Promise and market (Sandbox) are clearly defined
- The organization is aligned around 5 key strategies (Thrusts/Capabilities) for growth

All employees can report at any time what their productivity is and how it compares against goals

- Smart Numbers (key performance indicators) are identified for the organization
- Weekly measures for each individual/team are clearly displayed and reviewed

A "situation room" is established for the weekly executive team meeting

- Smart Numbers and Critical Numbers are posted bigger than life with goals clearly shown
- Data is presented graphically to help visualize trends
- Core ideologies, priorities, and market maps posted

As goes the Executive Team goes the rest of the firm

- Team members understand each other's differences, priorities, and styles
- The team meets offsite every few months for strategic thinking and renewal
- The team is having fun together

MEETING RHYTHM

Daily—Where we are today (10-15 minutes)

Daily huddle: What's Up, Metrics, Bottlenecks

Weekly—Improving what we do (2 hours)

News, Numbers, Customer & employee data, Collective Intelligence, 1-phrase close. Log of Who, What, When

Monthly—Learning and reviewing (4 hours)

Management team discussing 1-2 strategic items

Quarterly—Communicating new directions/theme (4-8 hours)

All-hands meetings once a quarter

Annual—Deciding on new directions/priorities (2 days)

Management team offsite, possibly professionally facilitated

Business Language

Core Values. Like the US Constitution or ten commandments, core values are 5 or 6 statements which answer the question "**SHOULD** we or **SHOULDN'T** we." They are discovered over time and last. And they tend to be different for each business, defining what is often called the corporate culture. At 3M, one of their core values is innovation. If they can't be innovative in a business area, they'll not do it or get rid of it. Jim Collins' "Mars" exercise helps discover core values.

Core Purpose & BHAG. This is a philosophical statement about **WHY** you're in business and is determined by your leader's particular reason for having passion for the business. Patagonia's (outdoor clothing) founder once exclaimed "Let my people surf" and that became their purpose statement. It says a lot about the founder's philosophy and style. The core purpose puts "heart" into the business. In addition, the business should be pursuing a Big Hairy Audacious Goal (BHAG). It should be a quantifiable pursuit with a 10 to 25 year horizon that is audacious but not braggadocios and reinforces fundamentals. Microsoft's pursuit of being on every desktop is an example.

Targets. The target level answers the question "**WHERE** you want the firm to be in 3 to 5 years." Besides deciding certain quantifiable targets, a firm should define the Sandbox in which the company chooses to play, so that it can be #1 or #2. The Sandbox definition includes the firm's expected geographical reach, product/service offering, and expected market share. Xerox changed their tag-line to "The Document Company" to signify a change in Sandbox focus from being a copier equipment seller to document management. Next, clearly articulate the key need you're going to satisfy for your customers, called your measurable Brand Promise - alternatively called a value-added proposition or differentiator. Finally, define five or six Key Thrusts/Capabilities necessary for you to dominate your defined Sandbox, fulfill your Brand Promise, and meet your quantifiable Targets.

Goals. These say **WHAT** the firm has to do this year in order to be what was defined on the Target level. Like New Year's resolutions, they are defined annually. The key is defining five or six key initiatives for the year. Answer the question "If we get these five or six things accomplished, we'll meet our annual goals." In addition, choose one or two critical numbers - ideally one off the income statement and one off the balance sheet - on which the firm will focus. These critical numbers define the biggest opportunity for providing positive impact on the firm.

Action Plans. These describe **HOW**, on a quarterly basis, you're going to accomplish your annual Goals. Think of these as 13 week MISSIONS (this is how we define mission). Besides setting specific quantifiables for the quarter and one or two critical numbers, you need to define five or six key "rocks" that have to be completed in order to accomplish the goals. In addition, a quarterly or annual theme should be established, complete with a key measurable goal, theme title, company-wide scoreboard, and defined celebration/reward.

Schedule. This sets deadlines **WHEN** we're going to complete certain actions. Nothing will ever get accomplished until it makes someone's weekly to do list. The idea is to take the 13 week actions and put together a week-to-week plan on how they'll get accomplished, so that everyone knows what they need to do. We encourage firms to move their thinking from a monthly rhythm (A/R deadlines, billing cycles, sales targets) to a weekly or daily rhythm.

Accountability. This names **WHO** is going to be sure a particular activity is going to be accomplished. These last four levels essentially define WHO has to do WHAT WHEN and HOW in order to get things accomplished in the organization. And it's important to understand the difference between accountability and responsibility. Many might be responsible for getting something done (creating a new product), but only one person can have accountability. If the buck doesn't stop somewhere with a single person for every activity, then it's likely not to be completed or completed well. "Who owns the outcome?"



Strategic Planning Definitions

Opportunities (to exceed Plan)	What are the “Top 5 and First of 5” most promising and potentially profitable Opportunities available for your organization to actively and aggressively pursue? Select a timeframe that best suits your situation: either in the next 3-12 months (low-hanging fruit), or a period spanning the next 3-24 months.
Threats (to making Plan)/ Brutal Facts	What are the “Top 5 and First of 5” most dangerous and potentially devastating Threats or Brutal Facts facing you and your organization? The timeframe should be immediate to within the next 12-24 months, and should include Threats over which you have some degree of control in countering.
Core Values and Beliefs	The “Should’s” and “Shouldn’t’s” that guide your organization’s Decisions, Attitudes, Behaviors and Performance. Should be 5-10 Commandments upon which your Vision for the future is built. It will be the basis for Selection, Performance Review Evaluations, Promotion, and Retention of Key Players going forward. Answer these questions: How do we conduct our business? What makes up our unique culture? When your values are clear, all your decisions are easier.
Purpose	Ask the questions: “Why are we doing what we are doing?” “What is the reason we are in the business we are in?” “What is our Passion for the business we’re in?” “What’s our Higher Reason for being in this specific business?”
Actions	What specific Actions do we need to take in the months and years ahead to best allow us to fulfill and achieve our Purpose and our Core Values and Beliefs?
BHAG	From Jim Collins – Your “Big, Hairy, Audacious Goal.” Should be: 10-25 Years out; Would make your organization Lofty and Legendary; Challenges you to Greatness; and must drive your Business Fundamentals. This is something that may take some time to figure out, so do not rush this process.
Targets (3-5 Years)	Where do you want your organization to be 3-5 Years from now, in terms of Revenues, Profitability and Market Value, at a calendar point that you select?
Sand Box	Defines three areas specifically and answers three Questions: 1.) What is your Geographic Market? 2.) What are your Product and/or Service Lines? And 3.) What are your Distribution Channels for your Products and/or Services?
Key Thrusts/Capabilities (3-5 year – Focus)	What 5 specific Moves or Actions must you and your organization take, or what Talents must you apply, in measurable terms, prioritized and stated as “Top 5 and First of 5” Goals to meet or exceed your 3-5 Year Targets?
Brand Promise	To identify your organization’s Brand Promise, ask yourself these Questions: 1) “What specific Need can we best satisfy for our Customers – Better than any of our Competitors?” 2) “What is our absolute Value-Added Proposition or Market Differentiator?”
Key Initiatives –One Year Focus (Similar to Thrusts)	What 5 specific Moves or Actions must you and your organization take, or what Talents must you apply, in measurable terms, to meet or exceed your 1- Year Goals? These are your Annual Priorities, stated as “Top 5 and First of 5” Goals in the current Fiscal or Calendar Year.
Actions (Quarter)	Where do you want your organization to be 1 Quarter from now, in terms of Revenues, Profitability, Market Value, Gross Margins, Cash, Accounts Receivables Days outstanding, Inventory Days, and Revenue per Employee? - generally at the next Quarter-end calendar point that you select – so you can make substantial, incremental progress towards your Annual Goals and your 3-5 Year Targets.
Rocks	Your Rocks are you company’s quarterly Action Items that are of the highest priority. There should be no more than 5 for the company and no more than 3 for an individual. Rocks are the action items that will be most responsible for achieving your quarterly and annual goals. For each rock, an individual or a team is designated to “drive it home.”
Theme Name	What will you call your Theme? How will you effectively frame your Theme so it captures the imagination and gels the commitment levels of the people in your organization? Examples: Cash is King or Embrace the Process or Good to Great or Pedal to the Metal or Back to Basics.
Celebration/Reward	In what unique, creative and appealing ways can you celebrate the measured and monitored progress and success (or lack thereof) of performance in your organization, and the achievement of your Theme Goals? Make your rewards fun, meaningful, and memorable.