

**Strategy is HOW we go from where we are today to our vision.**  
Great strategy is when we compare multiple different HOW's and also solve the root causes that create the barriers standing in our way. The recommended order for filling in these boxes is:

- 1. Our Vision and Purpose** = where you want to be
- 2. Our Current Day** = where you are now
- 3. Our Bridges (Opportunities)** = what you have to help
- 4. Our Barriers (Challenges)** = what is holding you back
- 5. How we will get to our vision** = what you aim to have achieved in 3-5 years
- 6. Monitoring progress** = keeping focused and having red flag mechanisms to keep on track
- 7. Next steps** = the Operations team to develop the annual plan and get sign off from the Board

When we are clear about the vision, we can then convert the vision into more tangible things by setting out 3-5 year outcomes / priorities, which represent the destination that the organisation wants to reach – our benchmark for measuring progress and success. These are designed to be specific, measurable, and realistic, and are used by management to guide their decision-making around where they focus. Governance can then test their assumptions to ensure they are utilizing the fastest, easiest, low cost and least risky way to get to the vision.

Monitoring progress involves assessing a range of key information, monitoring performance against previously stated goals, making decisions based on the information, and holding people accountable for performance. Ensure that all trustees agree to what they are not going to do. E.g. using the 'No' tool. We recommend they get a dashboard developed for them which includes social and financial measurements and metrics to identify risks the Trust will face.

These are things that we already have and the opportunities we could leverage that will help us climb to our goals in a faster, easier, low cost and less riskier way. These will include: Entrepreneurial principles; Team; Research; Existing infrastructure; Connections and potential partners; Identified customers; Expertise and knowledge

These capabilities may be at a governance or operational level, or we may even look for these capabilities in our partners.

**Our Current Day**  
Confronting the brutal facts of where we are today. Our current resources (number of staff and amount of money to allocate to implementing the strategy) as well as the things that we want to change. Also have a beneficiary profile and know the number of registered members

**OUTCOME 1**      **OUTCOME 2**      **OUTCOME 3**

**1 Our Vision and Purpose**  
The aspirational end state that we hope to achieve that is motivational and really clear for people to understand. Think of this as a sentence describing how successful your Trust has been. The purpose of an organisation is its reason for being.

**5 How are we going to get to the vision? 3-5 Long-term Outcomes / Priorities (3-5 years)**

**8 Next steps**  
Operations develop Annual Plan  
Achieving your annual plan helps propel an organisation towards achieving its long term goals. Setting your annual plan is developed by the operations team and signed off by the Board. Planning includes: budgets, resource requirements, timeframes and have consulted with at least one expert (The WHO) external to the organisation.

**7 Monitoring progress**

**4 Our Barriers (Challenges)**

The things that are currently hindering us from achieving our goals. Overcoming these will make a huge difference, and would be a great place to focus our resources. This could be a lack of capability in a specific area of the team, an issue in the organisation and barriers in the industry. We want to understand the root cause – keep probing for the root cause, understand it and then solve. These many include: Lack of clarity of vision, purpose key outcomes, structure, capability required; limited financial resources; limited capacity in team; poor systems and processes; politics (raruraru); lack of focus (working on too many things); need for more cohesion

**3 Our Bridges (Opportunities)**

**6 What capabilities do we need? (to take advantage of bridges and overcome barriers)**

**TWH's ENTREPRENEURIAL PRINCIPLES TO CONSIDER:**  
If you apply these principles consistently and in a disciplined way as part of your strategy, then you are guaranteed to accelerate your journey forward.

- LEAD/SUPPORT/INFLUENCE** = Leading a project takes significantly more resource than supporting someone else to deliver it. Influencing is low cost.
- 80 / 20 RULE** = It is true that roughly 20% of things deliver 80% of the results. Identify the few things that will have the most impact
- ASK THE 5x WHYS** = When we ask 'why?', and then get a response and ask 'why?', and keep asking 'why?', we can find the root cause
- FIRST DOMINO** = Of all the things to do, identify the first domino and focus your resources on knocking this over – it has a multiplier effect
- THE RIGHT QUESTION** = To find an effective solution, identify the 'fastest, easiest, lowest cost and least risky way' to achieve your goal
- ASK 'WHO', NOT 'HOW'** = Whatever your goal is, if you investigate and find 'who has done this before', then this will accelerate your progress – then determine whether we want to partner with them, employ them, or get coached by them to gain their knowledge
- BUILD AN 'A-TEAM'** = The quality of your team (in terms of their ability + commitment + availability) will determine the extent of your success
- PLACE SMALL BETS** = Test an idea by trying it out, and if it doesn't go the way you hoped, either pivot/adapt or fail fast and move on