Step 1

Understanding Implementation and Assessing Readiness

Purpose of Step

Just creating a strategic plan can produce significant value for an organization—as long as the plan has emerged from a deliberative process involving key stakeholders making use of relevant analyses and syntheses of appropriate information. A good strategic plan will clarify organizational purposes, directions, goals, and ways of achieving them. A good strategic planning process will also build intellectual, human, social, political, and civic capital. *But that is not enough!* Effectively implementing strategies, programs, projects, action plans, budgets, learning practices, and other implementation components will bring the strategies to life and create more tangible value for the organization (or collaboration or community) and its stakeholders as mandates are then met, the mission is fulfilled, and the goals are achieved. An effective implementation process is needed to coordinate and align the mission, mandates, systems, strategies, budgets, programs, projects, operations, and activities of the numerous executives, managers, professionals, technicians, frontline practitioners, and other stakeholders likely to be involved. The implementation process must also allow for ongoing learning and readjustments as new information becomes available and circumstances change—that is, as hopes and dreams encounter realities on the ground. Blending what is intended with what is possible and what emerges along the way will constitute the real meaning of implementation for the organization and its stakeholders. Helmut von Moltke, the Prussian army chief of staff from 1857 to 1888, captured the need for strategic adaptability in combat situations with two now famous aphorisms: "No plan survives contact with the enemy," and "Strategy is a system of expedients" (quoted in Hughes, 1993, pp. 45, 47). Although workbook users are highly unlikely to be in combat situations, the advice to attend to shifting contexts and to be adaptable regarding means—and perhaps ends—is well taken.

Successful implementation helps to complete the move from strategic planning to strategic management. *Strategic planning* may be defined as "a deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization (or other entity) is, what it does, and why it does it" (Bryson, 2011, p. 26). *Implementation* overlaps with strategic planning, but focuses on the effort to realize in practice an organization's mission, goals, and strategies; the meeting of its mandates; continued organizational learning; and the ongoing creation of public value. *Strategic management* is "the integration of strategic planning and implementation across an organization (or other entity) in an ongoing way to enhance the fulfillment of mission, meeting of mandates, and sustained creation of public value" (Bryson, 2011, p. 26). But effective integration of strategic planning and implementation does not happen by chance—although good fortune can certainly help. Douglas Adams, author of *The Ultimate Hitchhiker's Guide to the Galaxy*, notes how ill-conceived or poorly integrated plans and implementation approaches can lead to bemused disengagement or perhaps resigned defeat, when he says, "I love deadlines. I love the whooshing sound they make as they fly by" (Adams, 2002, p. ix). Effective strategic management does not happen by accident—it must be planned for and pursued in practice in an interactive, learning-focused, and results-oriented way.

A Brief Review of the Strategy Change Cycle

This workbook is a companion to *Strategic Planning for Public and Nonprofit Organizations*, fourth edition (Bryson, 2011) and to another workbook, *Creating Your Strategic Plan*, third edition (Bryson & Alston, 2011). *Strategic Planning for Public and Nonprofit Organizations* provides a detailed overview of and guidance on how to design an effective strategic planning and implementation process and is illustrated with several real-life examples. *Creating Your Strategic Plan* focuses on helping users develop a strategic plan, with less attention paid to implementation. *Implementing and Sustaining Your Strategic Plan* complements that workbook by specifically addressing the challenges of implementation.

The Strategy Change Cycle serves as an organizing framework for the book and both workbooks, so it makes sense to briefly review it now before focusing specifically on implementation. The Strategy Change Cycle has proven its worth for many public and nonprofit organizations as a conceptual and practical guide that helps them meet their mandates, fulfill their missions, and create public value. The ten steps of the cycle are
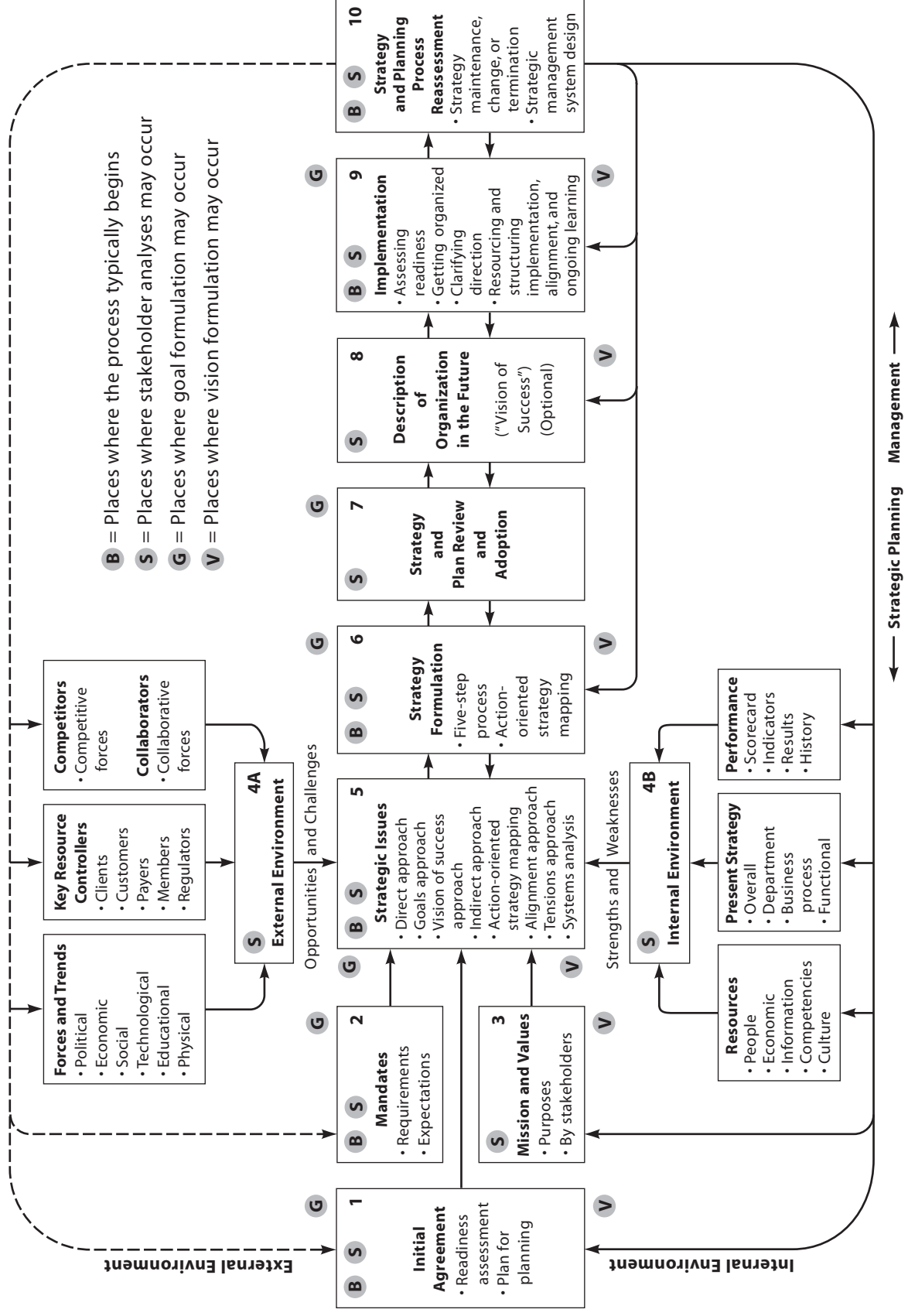
1. Initiating and agreeing on a strategic planning process
2. Clarifying organizational mandates

3. Identifying and understanding stakeholders and developing and refining mission and values

4. Assessing the environment to identify strengths, weaknesses, opportunities, and challenges (threats)

5. Identifying and framing strategic issues

6. Formulating strategies to manage the issues

7. Reviewing and adopting the strategic plan

8. Establishing an effective organizational vision for the future

9. Developing an effective implementation process

10. Reassessing strategies and the strategic planning process

The Strategy Change Cycle is presented graphically in Figure 3, and the steps are described briefly in Exhibit 1. The steps in the cycle are meant to guide organizational members as they

- Organize effective participation

- Create meritorious ideas for mission, goals, strategies, actions, and other strategic interventions

- Build a winning coalition

- Implement their strategies

- Build capacity for ongoing implementation, learning, and change

FIGURE 3

The Strategy Change Cycle

External Environment

Internal Environment

Forces and Trends
- Political
- Economic
- Social
- Technological
- Educational
- Physical

Key Resource Controllers
- Clients
- Customers
- Payers
- Members
- Regulators

Competitors
- Competitive forces

Collaborators
- Collaborative forces

4A **S** **External Environment**

Opportunities and Challenges

G **2** **B** **S** **Mandates**
- Requirements
- Expectations

3 **S** **Mission and Values**
- Purposes
- By stakeholders

V

G **1** **B** **S** **Initial Agreement**
- Readiness assessment
- Plan for planning

G **5** **B** **S** **Strategic Issues**
- Direct approach
- Goals approach
- Vision of success approach
- Indirect approach
- Action-oriented strategy mapping
- Alignment approach
- Tensions approach
- Systems analysis

V

G **6** **B** **S** **Strategy Formulation**
- Five-step process
- Action-oriented strategy mapping

S **7** **Strategy and Plan Review and Adoption**

S **8** **Description of Organization in the Future**

("Vision of Success") (Optional)

V

G **9** **B** **S** **Implementation**
- Assessing readiness
- Getting organized
- Clarifying direction
- Resourcing and structuring implementation, alignment, and ongoing learning

V

B **S** **10** **Strategy and Planning Process Reassessment**
- Strategy maintenance, change, or termination
- Strategic management system design

Strengths and Weaknesses

4B **S** **Internal Environment**

Present Strategy
- Overall
- Department
- Business process
- Functional

Performance
- Scorecard
- Indicators
- Results
- History

Resources
- People
- Economic
- Information
- Competencies
- Culture

B = Places where the process typically begins
S = Places where stakeholder analyses may occur
G = Places where goal formulation may occur
V = Places where vision formulation may occur

Strategic Planning   Management

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EXHIBIT 1

Steps in the Strategy Change Cycle

STEP 1: Initiate and Agree on a Strategic Planning Process

Step 1 involves negotiating an agreement with key internal (and possibly external) decision makers or opinion leaders on the overall strategic planning process, the desired outcomes, the schedule, the key planning tasks, and the likely requirements for success.

The strategic planning process agreement itself should cover

- The purpose of the effort

- A statement (however sketchy) of desired outcomes to be achieved

- Preferred steps in the process

- The schedule

- The form and timing of reports

- The role, functions, and membership of any group or committee authorized to oversee the effort (such as a strategic planning coordinating committee)

- The role, functions, and membership of the strategic planning team

- The likely requirements for success

- Any important limitations or boundaries on the effort

- Commitment of resources necessary to proceed with the effort

STEP 2: Clarify Organizational Mandates

The purpose of this step is to clarify the formal and informal mandates placed on the organization (the *musts* and *must nots* it confronts) and to explore their implications for organizational action.

STEP 3: Identify and Understand Stakeholders, Develop and Refine Mission and Values, and Consider Developing a Vision Sketch

A stakeholder is any person, group, or entity that can place a claim on the organization's attention, resources, or output or that is affected by that output. The key to success for public and nonprofit organizations is the ability to address the needs and desires of crucial stakeholders—according to those stakeholders' criteria.

The organization's mission, in tandem with its mandates, clarifies why it exists and its principal routes to creating public value. Any government, agency, nonprofit organization, or corporation must seek to meet certain identifiable social or political needs. Viewed in this light, an organization must always be considered the means to an end, not an end in and of itself.

The mission statement developed and refined in this step should grow out of a thorough consideration of who the organization's (or community's) stakeholders are. The organization's value system might also be identified, discussed, and documented. The organization may also wish to create a sketch of its *vision of success*, to guide subsequent planning efforts.

STEP 4: Assess the Environment to Identify Strengths, Weaknesses, Opportunities, and Challenges

In this step the strengths and weaknesses of the organization are assessed and their strategic implications noted. This may include identifying the organization's distinctive competencies—that is, those abilities that enable it to perform well in terms of key performance indicators (or critical success factors), especially when compared to its competitors. In addition, the opportunities and challenges (or threats) facing the organization are explored, and again, strategic implications are recognized.

STEP 5: Identify and Frame Strategic Issues

Together, the first four steps of the process lead to the fifth, the identification of strategic issues—the fundamental challenges affecting the organization's mandates, its mission and values, its product or service level and mix, its costs, its financing, its structure, its processes, and its management.

STEP 6: Formulate Strategies to Manage the Issues

Strategies are the means by which an organization intends to accomplish a goal or reach an objective. A strategy summarizes a pattern across policy, programs, projects, decisions, and resource allocations developed to deal with the issues identified in Step 5. Strategies may be of several types:

- Grand (or umbrella) strategy for the organization, collaboration, network, or community as a whole
- Strategy for organizational subunits
- Strategies for programs, services, products, or business processes
- Strategies for functions such as human resource management, information technology, finance, and purchasing

These strategies can be used to set the context for other change efforts aimed at restructuring, reengineering, reframing, repurposing, or otherwise changing the organization.

Steps 1 through 6 may be thought of as strategic *planning*, whereas Steps 7 through 10 are more about *management*. All the steps together may be thought of as a *strategic management process*.

STEP 7: Review and Adopt the Strategic Plan

The purpose of this step is to gain a formal commitment to adopt and proceed with implementation of the plan(s). This step represents the culmination of the work of the previous steps and points toward the implementation step, in which adopted strategies are realized in practice. Formal adoption may not be necessary in all cases to gain the benefits of strategic planning, but quite often it is.

STEP 8: Establish an Effective Organizational Vision for the Future

An organization's vision of success outlines what the organization should look like as it successfully implements its strategies and achieves its full potential. Such a description, to the extent that it is widely known and agreed on in the organization, allows organizational members to know what is expected of them without constant direct managerial oversight. This description also allows other key stakeholders to know what the organization envisions for itself. Visions of success actually may be developed at several places in the process. Most organizations, however, will not be able to develop an effective vision of success until they have gone through strategic planning more than once. Thus their visions

of success are more likely to serve as a guide for strategy implementation and less likely to be a guide for strategy formulation.

STEP 9: Develop an Effective Implementation Process

In this step adopted strategies are implemented throughout the relevant systems. An effective implementation process and action plan must be developed if the strategic plan is to be something other than an organizational New Year's resolution. The more that strategies have been formulated with implementation in mind and the more active the involvement of those required to implement the plan, the more successful strategy implementation is likely to be.

STEP 10: Reassess Strategies and the Strategic Planning Process

The purpose of the final step is to review implemented strategies and the strategic planning process. The aim is to find out what worked, what did not work, and why, and to set the stage for the next round of strategic planning.

This workbook attends in detail to *the last two steps* of the Strategy Change Cycle: how to develop an effective implementation process and how to review and reassess strategies in practice and the strategic planning process.

Desired Implementation Outcomes

Lasting and significant *added public value* is the most important implementation outcome that leaders, managers, and planners should seek from reasonably smoothly and rapidly meeting the organization's mandates, fulfilling its mission, achieving its goals, and in general satisfying key stakeholders. Achieving this overarching outcome will come about via these more instrumental outcomes:

- Creation and maintenance of the coalition necessary to support and implement the desired changes. The coalition may already exist; if not, it will have to be created. The size and shape of this coalition will vary depending on the nature of the changes being sought.

- Avoidance of the typical causes of failure (which may be seen as barriers or roadblocks to achieving the overarching outcome). These causes are legion, but include the following:

  Failure to maintain or create the coalition necessary to protect, support, and guide implementation.

  Failure to plan carefully for implementation.

  Resistance based on attitudes and beliefs that are incompatible with desired changes. Sometimes these attitudes and beliefs stem simply from the resisters' not having participated in strategy or plan development.

Personnel problems such as inadequate numbers, poorly designed incentives, inadequate orientation or training, or people's overcommitment to other activities or uncertainty that involvement with implementation can help their careers.

Incentives that fail to induce desired behavior on the part of implementing organizations or units.

Implementing organizations' or units' preexisting commitment of resources to other priorities and a consequent absence of uncommitted resources to facilitate new activities; in other words, there is little "slack" (Cyert & March, 1963).

The absence of administrative support services.

The absence of rules, resources, and settings for identifying and resolving implementation problems.

The emergence of new political, economic, or administrative priorities.

- Development of a clear understanding among implementers of what needs to be done and when, why, and by whom. Statements of goals and objectives, a vision of success, clearly articulated strategies, and educational materials and operational guides all can help. If they have not been created already, they may need to be developed in this step. Subsequent steps in the implementation process and accompanying worksheets will assist you in developing them. These statements and guides will help to concentrate people's attention on making the changes that make a difference as adopted strategies are reconciled with existing and emergent strategies.

- Use of a *debugging* process to identify and fix the difficulties that almost inevitably arise as a new solution is put in place. The process will involve an emphasis on learning and the use of formative evaluations focused on improving strategies in practices, programs, projects, and ongoing operations (Patton, 2008).

- Include summative evaluations (Fitzpatrick, Sanders, & Worthen, 2004; Mattesssich, 2003; Patton, 2008) to find out whether strategic goals have actually been achieved once strategies are fully implemented. Summative evaluations (as well as logic models) often differentiate between outputs and outcomes. *Outputs* are the actual actions, behaviors, products, services, or other direct consequences produced by policy changes. *Outcomes* are the benefits of the outputs for stakeholders and the larger meaning attached to those outputs. Outputs, in other words, are substantive changes, whereas outcomes are both substantive improvements and symbolic interpretations. Both are important in determining whether a change has been worth the expenditure of time and effort (McLaughlin & Jordan, 2010).

- Retention of important features of the adopted strategies and plans. As situations change and different actors become involved, implementation can become a kind of *moving target*. It is possible that mutations developed during the course of implementation could do a better job of addressing the issues than

the originally adopted strategy or plan can. In general, however, it is more likely that design distortions will subvert avowed strategic aims and gut their intent, so it is important to make sure that important design features are maintained or, if they are not, that the changes are desirable.

- Creation of redesigned organizational (or collaborative or community) arrangements that will ensure long-lasting changes. These new settings are marked by the institutionalization of implicit or explicit principles, norms, rules, decision-making procedures, and incentives; the stabilization of altered patterns of behaviors and attitudes; and the continuation or creation of a coalition of implementers, advocates, and supportive interest groups who favor the changes.

- Establishment or anticipation of review points, during which strategies may be maintained, significantly modified, or terminated. The Strategy Change Cycle is a series of loops, not a straight line. Politics, problems, and desired solutions often change (Kingdon, 2002). There are no once-and-for-all solutions, only temporary victories. Leaders, managers, and planners must be alert to the nature and sources of possible challenges to implemented strategies; they should work to maintain still desirable strategies, to replace strategies with better ones when possible or necessary, and to terminate strategies when their value is low or when they become completely outmoded.

If real public value has been created via these subordinate outcomes, then additional desirable outcomes, such as these, are also likely to be produced:

- Increased support for and legitimization of—or at least no opposition to—the leaders and organizations that have successfully advocated and implemented the changes (Boyne & Chen, 2006; Crosby & Bryson, 2005).

- Individuals involved in effective implementation of desirable changes are likely to experience heightened self-efficacy, self-esteem, and self-confidence (Kelman, 2005; Scharmer, 2009; Schein, 2010).

- Organizations (or collaborations or communities) that effectively implement strategies and plans are likely to enhance their capacities for action in the future. They acquire an expanded repertoire of knowledge, experience, tools, and techniques, and an expanded inventory of intellectual, human, social, political, and civic capital—and therefore are better positioned to undertake and adapt to future changes.
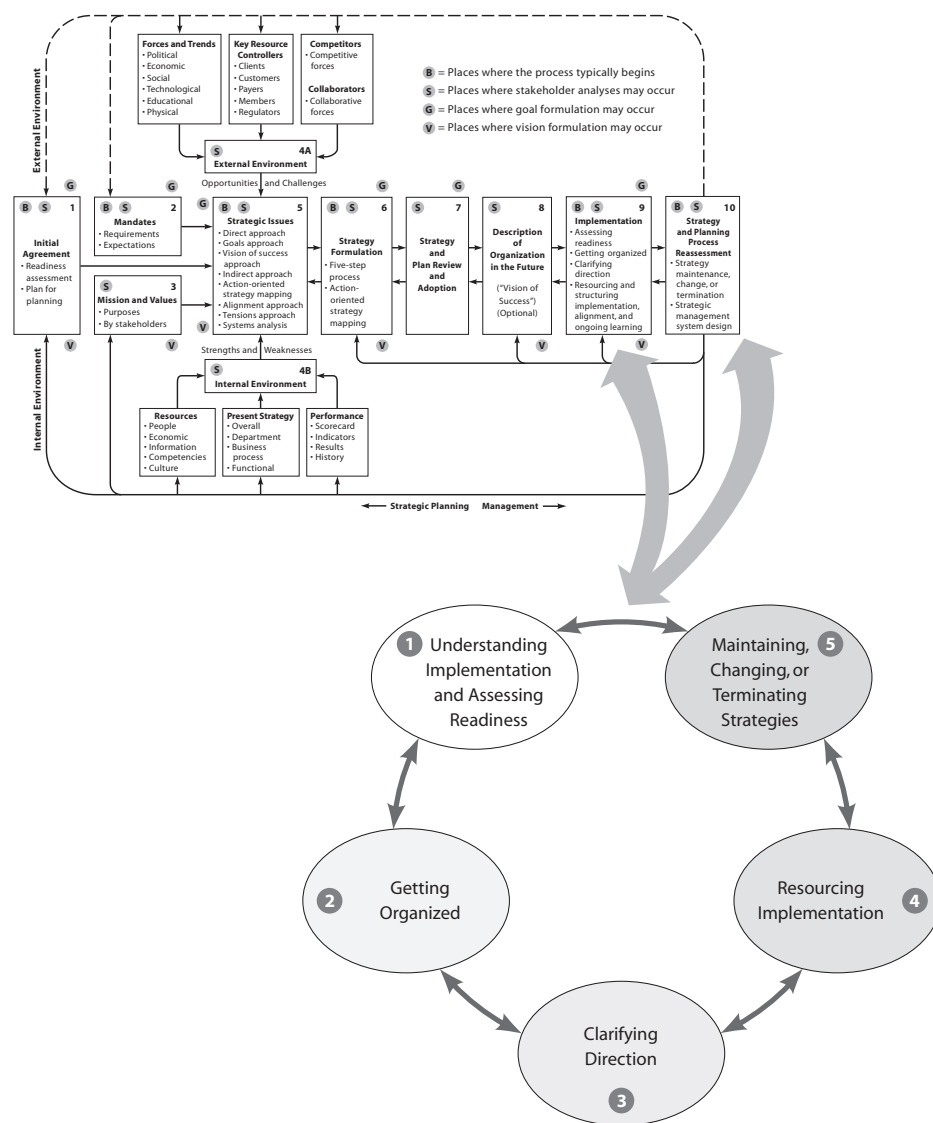
The Implementation Cycle

The Implementation Cycle elaborates Steps 9 and 10 of the Strategy Change Cycle— the steps focused on implementation and reassessment. Alternatively, it may be viewed as a subcycle within the Strategy Change Cycle. The Implementation Cycle consists of five major functions needing to be fulfilled, or categories of action

needing to be taken, in order for successful implementation to occur (see Figure 4). These action categories include:

- Understanding implementation and assessing readiness
- Getting organized
- Clarifying strategic and operational directions
- Resourcing and structuring implementation, alignment, and ongoing learning
- Maintaining, changing, or terminating strategies

FIGURE 4

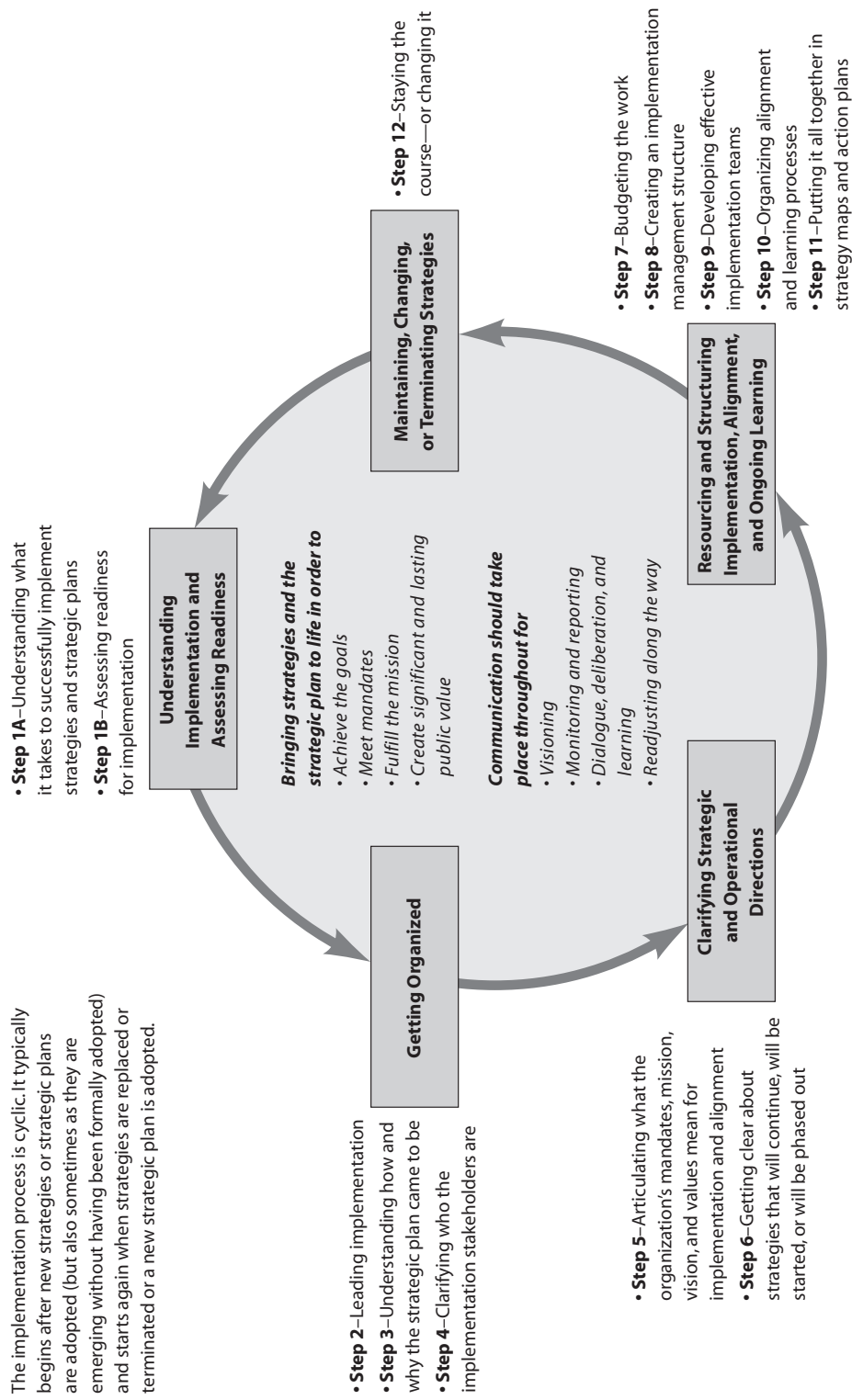## The Implementation Cycle as an Elaboration of Steps 9 and 10 of the Strategy Change Cycle

There are three main differences between the Implementation Cycle and the Strategy Change Cycle. First, much more is *given* during implementation. For example, important features of mission, mandates, vision, basic strategies, and basic starting resource allocations are essentially already decided. Although adjustments can be made in these elements, they typically occur on the margin, at least early in the implementation process. Later, as implementation experience increases, key stakeholders may decide to make significant changes in these elements. Second, much more implementation *detail* is developed and added. Strategic plans typically are fairly high-level documents. In contrast, successful implementation requires that high-level concepts be brought to life on the ground. The nitty-gritty operational details matter. This workbook and the worksheets within it are designed to help implementers move higher-level abstractions to grounded action. And finally, typically, the implementers are different from the strategic planners, at least in midsize to large organizations. The planners tend to be higher in the organization's hierarchy, whereas the implementers are closer to the front lines.

The Implementation Cycle's five broad action categories may be broken down into twelve steps (Figure 5). Implementation is viewed as a *cycle* for several reasons. First, the steps are iterative and conclusions reached in one step may be revised based on what is learned in subsequent steps. Second, the process takes place within, and must somehow accommodate, a number of other cyclic phenomena: fiscal years, election cycles, changing fashions, and so on. Finally, all strategies typically run their course and must be rethought; mission, vision, and values may need to be rethought at the same time. A new round of the Strategy Change Cycle is therefore required. The Implementation Cycle's action categories and steps are introduced further in the following paragraphs.

Understanding Implementation and Assessing Readiness

STEP 1: Understanding implementation and assessing readiness. Successful implementation involves effectively aligning actions with aspirations. Earlier we noted that if strategies have been formulated with a clear understanding of what it will take to implement them, and if the strategy formulators and implementers overlap to a significant degree, then implementation is likely to go much more smoothly and quickly. Frequently, however, strategies have been developed without a clear view of implementation requirements, and the strategy formulators and implementers are not the same. In these circumstances a useful starting point for implementers and implementation process overseers is to familiarize themselves with the basics of implementation and to assess the readiness of the organization for implementation work. If the assessment indicates areas for improvement, then work should be directed toward increasing readiness for implementation; otherwise, the chances of implementation success decrease in accord with the lack of readiness.

FIGURE 5

The Implementation Cycle

The implementation process is cyclic. It typically begins after new strategies or strategic plans are adopted (but also sometimes as they are emerging without having been formally adopted) and starts again when strategies are replaced or terminated or a new strategic plan is adopted.

- **Step 2**–Leading implementation
- **Step 3**–Understanding how and why the strategic plan came to be
- **Step 4**–Clarifying who the implementation stakeholders are

- **Step 5**–Articulating what the organization's mandates, mission, vision, and values mean for implementation and alignment
- **Step 6**–Getting clear about strategies that will continue, will be started, or will be phased out

- **Step 1A**–Understanding what it takes to successfully implement strategies and strategic plans
- **Step 1B**–Assessing readiness for implementation

- **Step 7**–Budgeting the work
- **Step 8**–Creating an implementation management structure
- **Step 9**–Developing effective implementation teams
- **Step 10**–Organizing alignment and learning processes
- **Step 11**–Putting it all together in strategy maps and action plans

- **Step 12**–Staying the course—or changing it

Understanding Implementation and Assessing Readiness

Getting Organized

Clarifying Strategic and Operational Directions

Resourcing and Structuring Implementation, Alignment, and Ongoing Learning

Maintaining, Changing, or Terminating Strategies

Bringing strategies and the strategic plan to life in order to
- *Achieve the goals*
- *Meet mandates*
- *Fulfill the mission*
- *Create significant and lasting public value*

Communication should take place throughout for
- *Visioning*
- *Monitoring and reporting*
- *Dialogue, deliberation, and learning*
- *Readjusting along the way*

Getting Organized

STEP 2: Leading implementation. This is the one absolutely crucial requirement. Strategy implementation does not happen without effective leadership of many kinds. Sponsors, champions, facilitators, team leaders, negotiators, and not least, good followers are all required. The purpose of this step is to ensure that the necessary leadership and followership are in place when and where they are needed. It is also important to view implementation as an opportunity for leadership development, thereby preparing people and the organization for sustained strategic management and the next round of strategic planning.

STEP 3: Understanding how and why the strategic plan came to be. Strategic plans are best viewed not as stand-alone objects but as negotiated documents embedded in the contexts and stakeholder relationships that produced them. Strategic plans typically represent explicit and implicit agreements and understandings about what will remain the same about the context and relationships and what will change. Successful implementation depends on understanding what the planners and decision makers saw as worth preserving, on the one hand, and in need of change, on the other hand. Implementers should understand the basic *theory of change* stated or implied by the strategic plan, however unsophisticated it might be. In other words, what are the elements of the plan and their interconnections, and is it reasonable to believe that *if* the strategies and actions outlined are taken, *then* the goals will be achieved, the mission fulfilled, and the mandates met? Special attention needs to be devoted to the organization's culture, what's good about it, and what will need to change, because every significant strategy change also typically involves a cultural change. In short, implementers should understand the reasons why the strategic plan was produced, and how, along with the strengths and weaknesses of the plan and planning process. Implementers also need to realize that successfully implementing a strategic plan can be much more difficult than developing the plan was in the first place.

STEP 4: Clarifying who the implementation stakeholders are. The key to success for both strategic planning and implementation is the satisfaction of key stakeholders according to their criteria for satisfaction. This step is meant to help implementers understand clearly and in detail what the stakeholder environment is for implementation and to plan how and in what ways stakeholders should be engaged in implementation efforts.

Clarifying Strategic and Operational Directions

STEP 5: Articulating what the organization's mission, mandates, and values mean for implementation and alignment. Strategies should help the organization meet its mandates, fulfill its mission, and realize its vision and values. Implementers should explore what the mandates, mission, and values mean or imply for

implementing the strategies. For example, if the organization has adopted a set of guiding values, presumably they should be reflected in the implementation process, its outputs, and outcomes. If not, something probably should change about the implementation or about the values.

STEP 6: Getting clear about strategies that will continue, will be started, or will be phased out. Strategies are defined as the patterns across policies, goals, actions, budgets, and other implementation elements. Unfortunately, existing strategies and the strategies outlined in strategic plans are typically rather vague. In this step implementers flesh out what existing strategies and any new ones articulated in the strategic plan mean in practice. This may involve (1) clarifying each strategy's *logic model* (Knowlton & Phillips, 2008; McLaughlin & Jordon, 2010), along with its implied requirements for personnel, competencies, systems, procedures, resources, and so forth; (2) identifying major implementation alternatives, along with the criteria for choosing among them; (3) comparing proposed strategies with existing strategies and deciding what to do as a result of the comparison, that is, drop one or the other, merge strategies, or somehow differentiate among them; (4) identifying implications for needed competencies and distinctive competencies and assets; (5) identifying cultural implications of strategy alternatives; and finally (6) developing performance indicators for each strategy.

Resourcing and Structuring Implementation, Alignment, and Ongoing Learning

STEP 7: Budgeting the work. An effort should have been made during the strategic planning process to separate strategic from operational concerns. Strategic matters should have been dealt with by senior leaders and other key stakeholders and perhaps a strategic planning coordinating committee, and operational matters referred to an operations group. During implementation, strategic and operational concerns must in effect be brought back together and reintegrated. Effective strategy implementation depends on having realistic financial, staff, staff development, technology, time, and other resource budgets available to reconcile the new strategies the plan calls for with ongoing strategies; it also depends on having a clear agenda of what will no longer be done—the *stop agenda*—owing to inadequate resources. This is the step where that should happen, unless the work was already done as part of developing the strategic plan. Attention to the development of a stop agenda is particularly important, so that freed resources can be devoted to higher priority uses.

STEP 8: Creating an implementation management structure. Many strategic initiatives should be treated as programs or projects (or portfolios of programs and projects) requiring special implementation management structures. This step assists implementers to design, organize, and staff these structures and also figure out how they might best be managed to support implementation.

STEP 9: Developing effective implementation teams. Teams are a basic implementation vehicle, and attention should be devoted to how they are assembled and led and how they function. Meetings are an important aspect of teamwork and they should be managed effectively. A great team can do almost anything; a badly organized, managed, and functioning team can be worse than useless.

STEP 10: Organizing alignment and learning processes. An important key to successful implementation is a well-designed learning process so that midcourse corrections are made along the way; alignments within and across strategies and structures are made; new learning is transferred to additional places where it is needed; and the organization, its members, and involved stakeholders acquire enhanced capacity for creating lasting public value and the next round of strategy change. The purpose of this step therefore is to put in place a process and mechanisms for ensuring ongoing learning to improve implementation, increase organizational alignment, and build capacity for useful work in the future. There are two keys: having an adequate performance control system in place in order to monitor and improve performance, and creating a system of interactive meetings to discuss performance and outline necessary actions to improve it. Getting the timing right for performance control and improvement activities is important, so that needed reviews and changes mesh with decision making.

STEP 11: Putting it all together in strategy maps and action plans. Effectively implementing strategies involves pulling together information garnered in previous steps into strategy maps and action plans. Strategy maps are word-and-arrow (or statement-and-arrow) diagrams that show how mission and vision may be achieved via particular goals, and how the goals may be achieved by pursuing specific strategies. The maps make graphic the logic that guides the strategic plan and its implementation. They offer a big-picture view that helps implementers all be—quite literally—on the same page. They help implementers see the forest and the individual trees. Action plans provide the detailed guidance on how to implement specific strategies within given time frames.

Maintaining, Replacing, or Terminating Strategies

STEP 12: Staying the course—or changing it. The final step of the Implementation Cycle is essentially the same as the final step of the Strategy Change Cycle (reassess strategies and the strategic planning process). Implemented strategies are reviewed to find out what worked, what did not work, and why. Judgments are made about which strategies should be kept as is, which should be modified, and which should be ended. The review may be extended to assess the strategic planning process as well and to set the stage for the next round of strategic planning.

The Implementation Cycle: Theory Versus Practice

Although the implementation process has been laid out in a linear, sequential manner, it must be emphasized that in practice the process is typically iterative: participants usually rethink what they have done several times before they reach final decisions represented in strategy maps and action plans. Moreover, the process does not always begin at the beginning. After implementation has begun, organizations may find themselves confronted with difficulties that lead them to engage in a serious review and analysis of how to improve the implementation process.

It is also important to note that implementation efforts must be tailored to the context in which they take place, including fitting with or within ongoing processes of organizational operation and change (processes that are typically cyclical or nonlinear). As noted, these processes include budgeting cycles, legislative cycles, decision-making routines of the governing board, and other change initiatives.

There are also different levels of implementation guidance and control, ranging from the more abstract or conceptual (such as mission, vision, and general goals) to the more specific or concrete (such as budgets and individual work plans). Implementation efforts may be orchestrated from the top, proceeding *deductively* down to the more concrete and specific level, or may be undertaken at the more concrete level, rising *inductively* toward the more abstract or conceptual level. Most often, implementation involves a combination of deductive and inductive approaches, and these must be blended as wisely as possible (Hill & Hupe, 2009; Mintzberg, Ahlstrand, & Lampel, 2009). This workbook is designed to accommodate top-down and bottom-up, deductive and inductive, implementation processes.

Key Design Choices

A number of interconnected design choices must be made to enhance the prospects for successful implementation. Here are some of the more important choices (also see Worksheet 3):

- What are the purposes of the implementation effort?

    In what ways are implementation efforts intended to enhance organizational or community performance and create public value?

    What other outcomes or benefits of implementation are being or should be sought?

    What values should the implementation process embody in the way it is organized and pursued?

- Whose implementation effort is it?

  Whose effort does it need to be in order to be successful?

  Is implementation to be owned by a community, collaboration, organization, organizational unit, program, project, or function?

  Is there a coalition in support of implementing desired changes? If so, who are the coalition members?

  How will the coalition be maintained?

  If a supportive coalition does not exist, how will it be built?

  What are the implications of this choice for participation?

- How will or should the process be tailored to the situation at hand?

  What are the implications of prior successful and unsuccessful implementation efforts for what comes next?

  Are new goal formulation and visioning activities necessary, and if so, where and when will they occur in the process?

  How will implementation efforts fit with other ongoing organizational processes and change efforts, such as budgeting cycles, process improvement and information technology initiatives, and so forth?

  How will the process be tailored to fit the organization's culture—even if that culture needs to be changed in some ways?

- How will or should the process be managed?

  Who are or should be the key sponsors of the process?

  Who will or should champion and manage the process? Who will or should champion important initiatives?

  How will or should the implementation process be broken down into programs, projects, phases, activities, tasks, and so on?

  What is or should be the time frame for implementation and its constituent parts?

  What kind of participation processes will be needed?

  What kinds of commitments will be required from sponsors and implementers in terms of time, energy, and financial and political resources?

  How will the process foster ongoing learning and midcourse corrections?

- What are the requirements for success?

  How will success be measured?

  What should or must happen in terms of key organizational performance indicators?

Who must be a part of the guiding coalition?

What is necessary for the process to be seen as legitimate in terms of procedure, process, support, and content?

What is it about the culture that must be honored? What has to change?

What organizational knowledge, skills, and competencies are required for implementation to succeed?

What are the absolute minimum resource requirements, in terms of funds, people, support, and other resources, without which the implementation is doomed to fail? (Recall that management attention is likely to be the most crucial resource.)

What Are the Dangers to Avoid?

There are many ways in which implementation can fail. Without broad and supportive sponsorship, a strong guiding coalition, careful and skilled management, adequate resources, necessary competence across the board, excellent meshing with ongoing processes, good timing, and a fair measure of luck, implementation may fail. The challenge is not so much with existing strategies that will be maintained; it is more with existing strategies that need substantial modification, new strategies just starting, and especially strategies that have been targeted for elimination. Whenever you ask people to do something differently, you may threaten the organization's existing culture, coalitions, values, structures, processes, and interaction patterns. Frustration, anger, rage, and rejection of the process may result, no matter how necessary the changes may be to ensure organizational survival and prosperity. There is also often an inherent skepticism and resistance to change among line managers, who have a strong operational orientation and want to know how change will improve their work situations. Fortunately, there are likely to be stakeholders dissatisfied with the status quo and able and willing to take on the new challenges. Tapping their disquiet, enthusiasm for change, and skill provides important resources for implementation (Kelman, 2005).

What Are the Keys to a Successful Process?

In many ways the keys to success are the mirror image of the potential sources of failure:

Be sure the organization is ready. Conduct a readiness assessment. The organization needs to be prepared to engage in successful implementation. If the organization is not prepared, identify capacity problems and figure out how to remedy them. Use the Readiness Assessment Questionnaire (Worksheet 2) to assist you in determining whether your organization is ready for implementation.

Strengthen leadership and ensure adequate participation by key stakeholders. You will need strong process sponsors and champions and the support of key stakeholders throughout the implementation process. Make sure they are willing to devote the time needed to ensure implementation success.

Make sure important initiatives are overseen by a skillful champion (or champions). Sponsors provide the authority and power to initiate, carry out, and legitimize implementation efforts. But sponsors are typically not involved in managing the process on a day-to-day basis—the champion is. You need a champion who understands what needs to be done and is committed to it.

Make sure you have adequate management capacity for effective implementation. Implementation doesn't just happen—in addition to sponsors and champions, adequate management capacity is needed to bring strategies to life. Commit the management resources necessary for a successful effort, including drawing on people who are skilled at implementation.

Build understanding to support wise implementation with thoughtful communication, action, and ongoing learning. Clearly communicate the purposes of the implementation process to key stakeholders. Engage in the dialogue and deliberation necessary to build adequate understanding of what is to be implemented, why, and how. Manage expectations so that neither too much nor too little is expected of the implementation process. Take the time and allocate the resources to "do it right."

Cultivate necessary political support. Sponsorship by key decision makers is typically crucial to the success of implementation efforts. They must be willing to emphasize the importance of the efforts and to intervene as necessary to respond to circumstances and keep things on track. Beyond that, a coalition of supporters must be built that is large enough and strong enough to adopt the strategic plan and support it during implementation.

Foster effective decision making for implementation. Help decision makers focus on ensuring successful implementation. Develop an implementation process and action planning efforts that will ensure the realization of adopted strategies by linking these processes to operational plans and to resource allocation decisions. Build in effective mechanisms for conflict management, because conflict will certainly occur—it's a natural and expected part of any change effort.

Make sure you have adequate resources—including necessary competencies—for successful implementation. Management capacity is the resource typically in shortest supply, but other resources are also crucial. These include adequate funding, staffing, space, transportation, orientation and training, technology, time, and possibly many other kinds of resources. Competency to do the job is a fundamental element of success. A poverty resource budget can be a death sentence. If you do not have adequate resources, figure out what you can do about it, if anything.

Design a process that is likely to succeed. Build on existing organizational and management change efforts and routines. Fit the implementation process to the situation at hand, which may mean pursuing either direct or some sort of staged implementation. Fit the process to the organization's (or collaboration's or community's) culture. Link the process to key decision-making processes and include ways to manage conflicts that arise. Be realistic about the scope and scale of the implementation effort in light of the management capacity and resources available. Find a way to accommodate the day-to-day demands on people's time while also asking them to do new things. Make sure that people see implementation as genuinely helpful.

Implementation Purposes and the Implementation Cycle

Figure 6 presents a somewhat finer grained view of the Implementation Cycle than the one found in Figure 5. Figure 6 shows how the steps of the Implementation Cycle are designed to help an organization fulfill five functions (or broad categories of action) meant to create desired implementation outcomes. The overall purpose of implementation (and strategic management) is to create significant and lasting public value, chiefly through helping the organization fulfill its mission, meet its mandates, and achieve its goals. Achieving these purposes requires implementing the organization's strategies and strategic plan—and perhaps revising them as needed along the way. Effective implementation depends on these five key, interconnected functions (or categories of action) being performed well: understanding implementation and assessing readiness; getting organized; clarifying strategic and operational directions and details; resourcing and structuring implementation, alignment, and ongoing learning; and maintaining, replacing, or terminating strategies. The twelve steps of the Implementation Cycle, other process design features, and the actions they foster are designed to fulfill these functions and thereby create the desired outcomes. Most steps contribute to more than one function, or broad category of action, and therefore the whole process must be seen as interactive. Planned and as-needed dialogue and deliberation are necessary throughout the process to make sure necessary things occur in the right way at the right time in the right place to produce significant and lasting public value.

Worksheet Directions

1. Consider using Worksheet 1 to interview those involved in developing or adopting the strategic plan, in order to gain important information about the planners' and adopters' intentions and views; this information may have a significant impact on the implementation process.

FIGURE 6

Implementation Purposes, Categories of Action, Design Features, and Context

Purposes or Desired Outcomes
- Creating public value
- Meet mandates, fulfill mission, and achieve goals

Major Functions or Categories of Actions to Produce Outcomes
- Understand implementation and assess readiness
- Get organized
- Implement the organization's strategies and strategic plan
- Clarify strategic and operational directions and details
- Resource and structure implementation, alignment, and ongoing learning
- Maintain, readjust, or terminate strategies

Process Design Features
- Step 1–Understanding implementation and assessing readiness
- Step 2–Leading implementation
- Step 3–Understanding how and why the strategic plan came to be
- Step 4–Clarifying who the implementation stakeholders are
- Step 5–Articulating what the organization's mandates, mission, vision, and values mean for implementation and alignment
- Step 6–Getting clear about strategies that will continue, will be started, or will be phased out
- Step 7–Budgeting the work
- Step 8–Creating an implementation management structure
- Step 9–Developing effective implementation teams
- Step 10–Organizing alignment and learning processes
- Step 11–Putting it all together in strategy maps and action plans
- Step 12–Staying the course—or changing it

Process Context

2. A summary of responses to the interviews should be put together and shared with key decision makers and others who can affect the shape and content of the implementation process.

3. Consider as well using the Implementation Readiness Assessment Questionnaire (Worksheet 2) to understand how prepared the organization is to implement its strategic plan. Implementation sponsors, champions, and key stakeholders are likely respondents.

4. A summary of responses to the questionnaire should be compiled and key decision makers should discuss what the results mean. Should implementation efforts move full steam ahead, or should efforts first be made to address any issues that come up as a result of the assessment?

5. Those involved in guiding initial implementation efforts should then work individually to fill out Worksheet 3, "Key Implementation Design Choices," and then they should discuss the resulting opinions as a group. Early on in the implementation effort, answers to many of the questions are likely to be unclear. This worksheet should therefore be updated as new information becomes available and subsequent steps in the Implementation Cycle are completed.

WORKSHEET 1

Interviewing People About the Upcoming Implementation Process

Instructions. Those thinking about implementing a strategic plan should consider interviewing key decision makers and other internal and external stakeholders who were involved in developing and adopting the strategic plan. The interviews may be very helpful in building support for implementation and making sure the process is designed in such a way that it will be successful.

Consider interviewing those who might have an interest in sponsoring, championing, or otherwise leading the implementation effort; and those who would most affect or be affected by the effort. Group interviews may also be useful but will need to be effectively facilitated and an adequate record kept of ideas offered and conclusions reached. Group interviews can be a part of targeted outreach and communications programs designed to build support for implementation.

Some preliminary stakeholder analysis may be necessary in order to develop the appropriate list of people or groups to be interviewed. After the interviewee list is decided upon, those exploring how best to pursue implementation should do the interviewing. It may be wise to have two interviewers conduct each interview—to understand more clearly what is being said and not said, to improve note-taking accuracy, and to broaden understanding of the implications for planning process design.

Consider using the following list of questions as a guide. Ask the person being interviewed to answer the questions from his or her perspective, not from that of the organization as a whole. To promote candor, emphasize that all interviews will be kept confidential; and to promote participation, note that summary information will be made available in the future.

Interview as Part of Readiness Assessment for Implementation

Date: _____

Name of interviewer(s): _____

Interviewee's (or group's) name: _____

Organization unit: _____   Function: _____

Job title: _____

Contact information: _____

External stakeholder name: _____   Title: _____

Contact information: _____

1. What do you think the most important reasons were for undertaking a strategic planning effort? Why do you think so?

Reasons for Engaging in Strategic Planning	Can You Say More About That?

2. What were the major substantive and process issues that needed to be addressed as part of the process? (Answers to this question may have been covered by answers to the prior question.)

Substantive Issues (need to improve client satisfaction, need to address funding shortages, and so on)	Process Issues (need to ensure adequate participation, need for reasonable transparency, need to improve quality of decision making, and so on)

3. What do you think were the most important outcomes of the strategic planning process, both in terms of *tangible* products—such as a strategic plan or changes in resource allocations, behaviors, or facilities—and *intangible* products—such as changed understandings, relationships, or organizational reputation?

4. Were there any issues not addressed as part of the strategic planning process that should have been addressed?

5. Does the fact that those issues were not addressed have any implications for implementation of the strategic plan?

6. What do think the top 5 priorities for implementation ought to be? Please rank them from 1 to 5 with 1 being the most important.

    1.

    2.

    3.

    4.

    5.

7. Should they be addressed in that order, or not?

8. What do you think needs to stay the same or endure as a result of the implementation process, and what should change?

Stay the Same	Change

9. For the implementation effort to succeed, what do you think must happen? In other words, what do you think is absolutely necessary for success? Why do you think so?

Required for Strategic Planning Success	Why Is It a Requirement?

10. Who should have a leadership role in the implementation process and why? Who should probably not have a role in the process and why?

Should Have Some Leadership Role	Should Probably Not Have a Leadership Role

11. Can you think of any key questions that this worksheet has not touched on?

12. Do you have any other insights, ideas, or suggestions regarding strategic planning for this organization?

Thank you for your time!

WORKSHEET 2

Implementation Readiness Assessment Questionnaire

Instructions. This questionnaire is meant to help those thinking ahead to the process of implementing a strategic plan. Implementation can be very challenging work and an organization needs to be ready for it. Being "ready" doesn't mean everything must be in fabulous shape; it does mean having a good idea of the current situation and what might be done over the course of an implementation process to increase the chances of success. The questionnaire provides a template that should be adapted as needed to make it useful.

Implementation Readiness Assessment Questionnaire

Dear _____ ,

We will soon have a new strategic plan and must prepare ourselves for implementation efforts in accord with the plan. Implementation will include continuing many of the things we already do, integrating new initiatives into ongoing operations, and phasing out other activities. The purpose of this Implementation Readiness Assessment Questionnaire is to take stock of where we are now and what we might need to do to prepare ourselves for successful implementation.

Please complete the following information:

Name: _____

My unit, division, or organization is: _____

My program, project, or functional area is: _____

Instructions for Completing the Questionnaire

There are no "right" or "wrong" answers.

For each statement in this questionnaire, please *check* the box for the number from 1 (strongly disagree) to 5 (strongly agree) that best reflects your response to the statement. When a statement or set of statements does not apply to your situation, please mark the NA (not applicable) box.

Please be candid in your responses and draw on your experiences in the last two years.

There is a space for comments after each set of questions.

Understanding implementation (Step 1)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
We have extensive experience with successfully implementing changes—we understand what is involved and how to make it work.						
We make regular dialogue and deliberation a part of everything we do.						
We routinely set time aside to assess what is working well, what is not, what modifications might improve what we do, and what lessons we should take away for current and future use.						

Comments:

Leading implementation (Step 2)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
We have a strong sponsor(s) to authorize and legitimize the implementation effort.						
We have a strong champion(s) in place to oversee day-to-day implementation efforts.						
Our leadership team is clearly focused—our goal is clear.						
There is a high level of trust among the members of the leadership team—our communications are open and honest.						
I personally have a strong sense of urgency to move our organization ahead.						

Comments:

Worksheet 2

Understanding how and why the strategic plan came to be (Step 3)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
We understand clearly why the strategic planning effort was undertaken, which issues were addressed, which were not, and what tangible and intangible immediate outputs and outcomes were produced.						
We understand what those involved in the strategic planning process think are the requirements for imple-mentation success.						
We understand what goes on when the organization works and succeeds—and what goes on when things are not working well.						

Comments:

Worksheet 2

Implementing and Sustaining Your Strategic Plan.

Clarifying who the implementation stakeholders are (Step 4)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
We know who our key stakeholders are and what matters to them.						
We engage with key stakeholders in effective ways to facilitate our work.						
We have a strong coalition in place to support and protect implementation efforts.						

Comments:

Articulating what the organization's mandates, mission, vision, and values mean for implementation and alignment (Step 5)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
As an organization (or group) we have a clear mission.						
As an organization all our work is informed by our mission.						
We pay attention to our mission on a day-to-day basis.						
We have a clear and shared vision of organizational success to guide our implementation efforts.						
We know what success would look like for us as an organization.						

Comments:

Worksheet 2

Implementing and Sustaining Your Strategic Plan.

Getting clear about strategies that will continue, will be started, or will be phased out (Step 6)	**1 Strongly Disagree**	**2 Disagree**	**3 Neither Agree nor Disagree**	**4 Agree**	**5 Strongly Agree**	**NA**
We are able to do both our day-to-day work and accommodate major changes.						
Risk taking is encouraged in our organization.						

Comments:

Budgeting the work (Step 7)	**1 Strongly Disagree**	**2 Disagree**	**3 Neither Agree nor Disagree**	**4 Agree**	**5 Strongly Agree**	**NA**
We always link our budgets directly to our strategic priorities.						
We always have or find the resources needed to get the job done.						

Comments:

Worksheet 2

Implementing and Sustaining Your Strategic Plan.

Creating an implementation management structure (Step 8)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
We have the needed management capacity (that is, sufficient management staff numbers, time, and attention) to implement the strategies and strategic plan.						
We have the needed management competencies (skills and abilities) to implement the strategies and strategic plan.						
We have effective two-way communications up and down and within and outside the organization.						
We have more than adequate information technology needed to do the work (including appropriate Web 2.0 and higher technologies).						
We are very good at managing programs and projects.						
We finish projects on time and on budget.						
Our organization's structure is flexible to accommodate change.						

Comments:

Worksheet 2

Implementing and Sustaining Your Strategic Plan.

Developing effective implementation teams (Step 9)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
There is effective cross-organizational cooperation.						
There are adequate incentives to encourage working together.						
We have excellent conflict management mechanisms and processes in place.						
We work well in teams.						
I feel valued as an employee.						

Comments:

Organizing alignment and learning processes (Step 10)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
Deliberation and dialogue about important matters are encouraged in our organization.						
We act quickly to address important issues.						
We make extensive use of data and analysis to make important decisions.						
There is a merit-based system of rewards and recognition tied to goal achievement and working together.						
We have well-understood and accepted performance measures in place against which to assess all of our important work.						
We are a performance-driven organization.						
We make extensive use of formative evaluations and ongoing collective learning processes to constantly improve our work and results.						

Comments:

Putting it all together in strategy maps and action plans (Step 11)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
We use clear and easily understood graphics to show the direct connections from mission, mandates, and vision to strategies, actions, and results on the ground.						
Action planning is standard practice in our organization for every initiative, ongoing operation, and individual.						
The contributions of each action plan to the achievement of our strategic goals and mission are clear.						
The board has its own action plan.						

Comments:

Staying the course—or changing it (Step 12)	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	NA
We are not afraid to quit doing things that are either low priority or not working well.						
We have a strong work ethic as an organization (or group).						
I am open to change.						

Comments:

Any final thoughts?

WORKSHEET 3

Key Implementation Design Choices

Instructions. A number of interconnected design choices must be made to enhance the prospects for successful implementation. The questions listed in this worksheet are designed to help the initiators of the implementation effort explore these choices and to set the stage for further discussions on implementation readiness and the design of the process. This information will be aggregated, and individual comments will be kept confidential. At the outset of the implementation effort, answers to many of these questions are likely to be unclear. This worksheet should therefore be updated as new information becomes available.

Name: _____

Organizational unit (if you are an external respondent, please note that here):

_____

Job title: _____

1. What are the purposes of the new implementation effort from your perspective?

   a. In what ways are the implementation efforts intended to enhance organizational or community performance and create public value?

b. What other outcomes or benefits of implementation are being or should be sought?

c. What values should the implementation process embody in the way it is organized and pursued?

2. Whose implementation effort is this currently (for example, the board, management, some other group or person)?

a. Whose effort does it need to be in order to be successful?

b. Is the implementation going to be "owned"—ultimately, if not now—by a community, collaboration, organization, organizational unit, program, project, or function? If yes, who or what is that "owner"?

Worksheet 3

Implementing and Sustaining Your Strategic Plan.

c. Is there a coalition in support of implementing desired changes? If so, who makes up that coalition?

d. How will the coalition be maintained?

e. If a supportive coalition does not exist, how will it be built?

f. What are the implications of your answers to items a through e for participation?

3. How will or should the implementation process be tailored to the situation at hand?

a. What are the implications of prior successful implementation efforts for what comes next?

b. What are the implications of prior unsuccessful implementation efforts for what comes next?

c. Are new goal formulation and visioning activities necessary, and if so, where and when should they occur in the process?

d. How will implementation efforts fit with other ongoing organizational processes and change efforts, such as budgeting cycles, process improvements, information technology initiatives, and so forth?

Worksheet 3

Implementing and Sustaining Your Strategic Plan.
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e. How will the process be tailored to fit the organization's culture—even if that culture needs to be changed in some ways?

4. How will or should the process be managed?

a. Who are or should be the key sponsors of the process?

b. Who will or should champion and manage the overall process?

c. Who will or should champion important initiatives?

d. How will or should the implementation process be broken down into programs, projects, phases, activities, tasks, and so on?

e. What is or should be the time frame for the implementation process overall and for its major constituent parts?

f. What kind of participation processes will be needed?

g. What kinds of commitments will be required from sponsors and implementers in terms of time, energy, and financial and political resources?

h. How will the process foster ongoing learning and midcourse corrections?

5. What are the requirements for success?

   a. How will success be measured?

   b. What should or must happen with the key organizational performance indicators?

   c. Who must be a part of the guiding implementation coalition?

   d. What is needed in terms of procedure, process, support, and content for the process to be seen as legitimate?

e. What features of the organization's culture must be honored? What has to change?

f. What organizational knowledge, skills, abilities, and competencies are required for implementation to succeed?

g. What are the absolute minimum resource requirements, in terms of funds, people, support, and other resources, without which implementation is doomed to fail? (Recall that management attention is likely to be the most crucial resource.)

Additional comments:

Worksheet 3

Implementing and Sustaining Your Strategic Plan.