

# Contents

Preface	ix
Acknowledgments	xvii
The Authors	xix
<b>PART 1 UNDERSTANDING IMPLEMENTATION AND ASSESSING READINESS</b>	<b>1</b>
<b>Step 1</b> Understanding Implementation and Assessing Readiness	3
Worksheets	
1 Interviewing People About the Upcoming Implementation Process	25
2 Implementation Readiness Assessment Questionnaire	32
3 Key Implementation Design Choices	44
<b>PART 2 GETTING ORGANIZED</b>	<b>53</b>
<b>Step 2</b> Leading Implementation	55
Worksheets	
4 Implementation Process Sponsors	71
5 Implementation Process Champions	73
6 Identifying Possible Members of the Implementation Coordinating Committee	75
7 Developing a Charge for the Implementation Coordinating Committee and Related Subgroups	78
8 Understanding and Linking Forums, Arenas, and Courts	82
9 Values to Sustain Innovation and Change	88

<b>Step 3</b>	Understanding How and Why the Strategic Plan Came to Be	91
	Worksheet	
	10 Agenda for Follow-Up Meeting to Assess Results of Interviews of Strategic Plan Preparers and Adopters	95
<b>Step 4</b>	Clarifying Who the Implementation Stakeholders Are	99
	Worksheets	
	11 Implementation Stakeholder Identification	102
	12 External Implementation Stakeholder Analysis	104
	13 Internal Implementation Stakeholder Analysis	106
	14 Power Versus Interest Grid	108
	15 Implementation Support Versus Opposition	110
	16 Creating the Supportive Coalition	111
	17 Engaging External Implementation Stakeholders	113
	18 Engaging Internal Implementation Stakeholders	116
<b>PART 3</b>	<b>CLARIFYING STRATEGIC AND OPERATIONAL DIRECTIONS</b>	<b>119</b>
<b>Step 5</b>	Articulating What the Organization's Mandates, Mission, Vision, and Values Mean for Implementation and Alignment	121
	Worksheets	
	19 Gaining Clarity About the Implications of the Organization's Mandates for Implementation	124
	20 Understanding What the Organization's Mission Means for Implementation	125
	21 Understanding What the Organization's Values Mean for Implementation	127
	22 Understanding What the Organization's Vision of Success Means for Implementation	128
	23 How and Why the Organization Creates Public Value	131
<b>Step 6</b>	Getting Clear About Strategies That Will Continue, Will Be Started, or Will Be Phased Out	133
	Worksheets	
	24 Evaluating Priorities for Existing Strategies, Programs, Products, Services, and Projects	135
	25 Evaluating Priorities for Proposed New Strategies, Programs, Products, Services, and Projects	136
	26 Reconciling Priorities Among Existing and Proposed Strategies, Programs, Products, Services, and Projects	137
	27 Strategy, Program, Product, Service, or Project Statement and Component Elements	139

<b>PART 4</b>	<b>RESOURCING AND STRUCTURING IMPLEMENTATION, ALIGNMENT, AND ONGOING LEARNING</b>	<b>147</b>
<b>Step 7</b>	Budgeting the Work	149
	Worksheets	
	28 Developing a Budget for Strategic Plan Implementation	152
	29 Developing a Summary Budget for Implementation	155
	30 Developing a Strategic Annual Budget for Large, Complex Organizations	157
<b>Step 8</b>	Creating an Implementation Management Structure	159
	Worksheets	
	31 Project Assignment	167
	32 Assignment of Work to Project, Program, and Portfolio Categories	169
	33 Assignment of Projects, Programs, Portfolios, and Other Work	170
<b>Step 9</b>	Developing Effective Implementation Teams	173
	Worksheets	
	34 Creating Implementation Recommendation and Action Teams (I-Teams)	176
	35 ICC and I-Team Tasks, Membership, Competencies, Roles, and Responsibilities	186
	36 Team Leader Self-Assessment	190
	37 Meeting Agenda	192
	38 Meeting Summary	195
	39 Meeting Evaluation	197
	40 Team Self-Assessment	200
<b>Step 10</b>	Organizing Alignment and Learning Processes	203
	Worksheets	
	41 Alignment Checkup	208
	42 Designing Learning Forums	210
	43 Facilitating Dialogue Guidelines	212
	44 Identifying Needed Formative Evaluations	215
	45 Employee Performance Self-Review	218
	46 Performance Review and Development Plan Process	222
	47 Coaching for Successful Implementation	228
	48 Professional Development Request Form	231

**Step 11** Putting It All Together in Strategy Maps and Action Plans 233

## Worksheets

- 49 Board Action Plan 241
- 50 Action Planning 245
- 51 Action Planning for the Stop Agenda 248
- 52 Microsoft Project Schedule Template 251
- 53 Summary of Actions and Responsibilities 259
- 54 Strategy/Action Status Report Form 260
- 55 Implementation Communications Plan 261
- 56 Creating an Elevator Speech 263

**PART 5 MAINTAINING, READJUSTING, OR TERMINATING STRATEGIES 265****Step 12** Staying the Course—Or Changing It 267

## Worksheets

- 57 Improving Existing Strategies 269
- 58 Identifying Needed Summative Evaluations 270
- 59 Improving the Implementation Process 273
- 60 Improving the Strategic Planning Process 276

**RESOURCES 279**

- A Brainstorming Guidelines 281
  - B Snow Card Guidelines 283
- Glossary 285
- Bibliography 289