

**Strategic Positioning – The *New* Strategic Planning**

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Sample Training Workbook



## Overview

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### Objectives

- Define and describe an enhanced strategic plan
- Introduce brand, image, and position as planning context
- Integrate planning, marketing, and communications
- Challenge veteran staff and board to apply more sophisticated tools towards organizational development and growth

### Outcomes

- Define and apply concepts of brand, position, and image
- Update strategic planning for a more integrated strategic positioning approach
- Understand how to strategically position your organization in the community for stronger visibility and results
- Use position to move to the next level

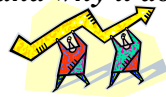
### Agenda

- Introduction
- Definitions and Frameworks
- Strategic Planning
- Strategic Positioning
- Integrating Planning, Positioning, and Organizational Development
- Application and Questions

### **Strategic**

*Deliberate, calculated decisions or design, based on an understanding of external, market, and internal forces and current and expected conditions; broad, organization-wide, over-arching all programs and services*

***“Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does and why it does it.” (Bryson)***



***“The essence of strategy is choosing what not to do.” (Porter)***

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## Definitions

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**Brand:** An organization's (or program's) essence. The distinguishing, enduring, and endearing characteristics. Brand is the distinct quality or experience that becomes universally anticipated by the constituents.

**Goals:** The results or outcomes in specific, measurable, attainable, realistic, time-framed terms that define what will be achieved or accomplished by a variety of programs, tasks, or activities.

**Identity:** The distinct and unequivocal definition and description of the program. Defined by why, what, and how it does what it does. Typically made explicit by the mission, vision, values, goals, and objectives.

**Image:** How others perceive the organization; should be aligned with identity.

**Imperatives:** Those things that emerge as essential for the organization's strategic focus. Based on the situation analysis, likely to be the obvious conclusions of an objective, analytical, systematic, and comprehensive process.

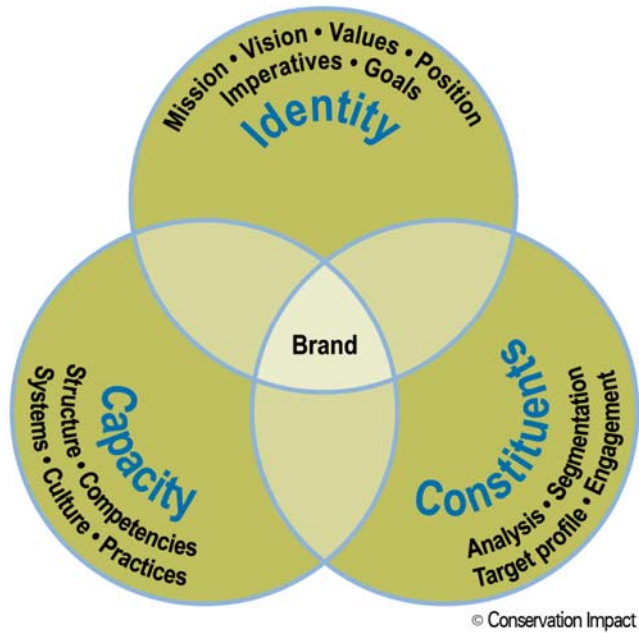
**Objectives:** Those few strategies that will most efficiently and effectively achieve strategic goals and align with the organization's unique purpose, method, and niche.

**Position:** The place or niche the program occupies within a sphere of influence. By definition, position is relative to the other programs that operate within that sphere.

## Frameworks

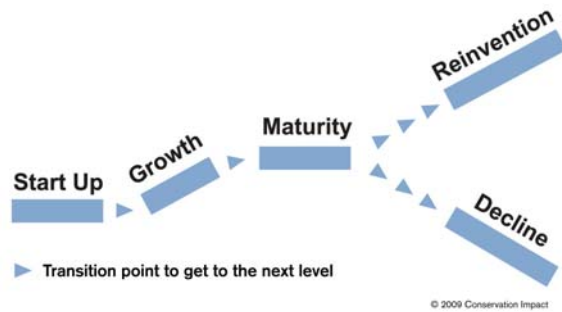


## Integrated Strategy



## Next Level

Refers to an organization's ability to leverage assets and brand to be more successful towards achieving mission-related results; to reach and engage a larger and more supportive constituency; and to be more strategically, operationally, and financially focused, stable, and sustainable.



## Strategic Planning Outline

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### *Situation Analysis*

- External – socio-economic-political
- “Industry” trends
- Institutional landscape
- Demographic and psychographic trends and issues
- Internal

### *Strategic Issues / Decisions*

- Fundamental, core

### *Mission*

- Purpose, short declarative and simple – why you exist

### *Vision*

- Descriptive, visual image of what it looks like when you are successful

### *Imperatives*

- Those things you must do, to the exclusion of all else, to be successful moving forward

### *Goals*

- Specific, detectable, realistic *outcomes* / results - what you will accomplish

### *Objectives*

- How you achieve goals – the few overarching strategies (not all the tasks) towards outcomes

### *Operating Plan*

Strategic Goal 1	Critical Tasks	Necessary Outcome	Staff/ Board/ Volunteer Responsibility	Due Date
Objective 1				
Objective 2				
Objective 3				

## Strategic Positioning

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### Overview

- More sophisticated planning considers brand, position, and image.
- A more externally focused, market-driven analysis to define the organization's identity and niche.
- Position considers competitive environment and niche opportunities.
- Potent organizations fully occupy and “own” their niche.
- Positioning capitalizes on distinction and assets to go to the next level.

Can't *sort of* position, have to build whole organization around position, requiring focus and deliberate planning and development.



*Positioning quite literally defines the tables at which you sit*

## Positioning Process

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### *Situation analysis*

- Trends, issues
- Industry growth and changes
- Institutional landscape

### *Competitive / comparative environment*

### *Constituent / potential constituent interests and unmet needs*

- Demographics and psychographics – how people behave relative to a product or cause
- Market trends
- External to organization, not satisfaction surveys
- Opportunities and unmet needs

### *Organization's distinctive competencies and assets*

- Underutilized assets
- Distinct history, brand, strength
- Latent or untapped potential

### *Gaps, needs, or unsolved problems*

- Overlap of external needs and internal assets

### *Alternative positions*

- Geographic sphere
- Competencies
- Market niche; Other?

### *Strategically advantageous / feasible / necessary position*

- Position decision
- Organizational implications
  - May redefine brand, image
  - Implications for strategic decisions

### *Then, strategic plan based on position*

- See strategic plan outline

### *Organizational design and development*

- See *Integrated Strategy*

## **The Next Level: Positioning or Re-positioning**

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### **Impact and Success**

Strategic focus, niche in marketplace to be the model (not done before)

### **Re-invigoration, Reverse Declining Market-share**

### **Leverage Assets and Organizational Sustainability**

### **Power and Influence**

Own a niche, expectations

### **Broaden Market Share, Presence**

## Sample Outline: Positioning Plan

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- 1) Introduction
  - a) Description
  - b) Purpose and goals
  - c) Methodology
  
- 2) Situation Analysis
  - a) External trends and issues
  - b) Industry analysis
  - c) Comparative analysis
  - d) Market information
  - e) Perceptions
  - f) Opportunities
  
- 3) Organizational Capacity
  - a) Assets
  - b) Distinctive competence
  - c) Obstacles
  
- 4) Position Analysis
  - a) Current position, brand, image
  - b) Positioning opportunities and alternatives
  - c) Scenarios
  
- 5) Selected Position
  - a) Strategic issues
  - b) Target market and marketing implications
  - c) Brand and image
  - d) Strategic focus
  
- 6) Organizational Implications
  - a) Strategic plan
  - b) Design and development
  - c) Programming and outreach
  - d) Strategic alliances

If you would like additional information about Strategic Positioning, please contact Jennifer Burstein at [jennifer@conservationimpact.com](mailto:jennifer@conservationimpact.com) to request a free copy of our educational booklet on this topic.

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Conservation Impact is dedicated to helping organizations achieve results towards environmental conservation, resource sustainability, and public and community health. We provide comprehensive organizational development consulting to nonprofit organizations and public agencies.

Founded in 1996, Conservation Impact has worked on more than 765 projects with nearly 500 organizations nationwide and internationally. The company specializes in strategic planning and positioning, marketing, and organization analysis and development. We use an Integrated Strategy approach that looks at organizational identity, capacity, and constituents. We help our clients go to their next level of development.

The Conservation Impact staff bring significant expertise in nonprofit management, marketing, and conservation planning with degrees in biology, ecology, environmental conservation, nonprofit management, and public administration.

Conservation Impact's sister company, Nonprofit Impact, focuses on organizations and agencies dedicated to improving the health and well being of individuals and communities and those working to create a more civil, just, and equitable society.

For more information about the companies, our team, or our work, please call us at 303.223.4886 or visit us online at [www.conservationimpact.com](http://www.conservationimpact.com) or [www.nonprofitimpact.com](http://www.nonprofitimpact.com).

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