

# Agile Strategy for the Social Venture

Planning Your Work When You Don't  
Know What's Coming

SVI Alberta 2022



VANCOUVER | TORONTO | LONDON



# Mike Rowlands

I work at the intersection of business, community and sustainability, supporting visionary leaders around the world, helping to craft distinctive strategies, disrupt markets, and accelerate success.

As a keynote speaker and frequent workshop presenter, I've taught strategy, entrepreneurship, sector collaborations, branding and communications.

But I'm happiest when I'm hosting juicy, generative conversations with people and groups, in service to humanity.

- ▶ President & CEO of Junxion
- ▶ Chair at Hollyhock
- ▶ Director at ORS Impact
- ▶ Ambassador of B Corp
- ▶ Producer, Social Venture Institute

# Let's Be Audacious, Together....

Junxion Strategy is an international social impact consultancy that supports leaders of the next economy.

For over 20 years, Junxion has been advising on strategy, sustainability, and social impact, building a global portfolio of clients that include some of the world's most courageous and generative brands—adidas, Doctors without Borders, MEC, Reconciliation Canada, and United Nations, to name a few. Junxion has also helped more companies achieve B Corp certification than any other consultancy.

From offices in Vancouver, Toronto, and London, UK, Junxion has served clients on five continents, helping define their purpose, plan their impact, tell their stories, and embrace accountability.

Junxion is a proud member of Social Venture Circle and the Wellbeing Economy Alliance, and is an award-winning, 'Best *for the World*,' Certified B Corp.



# Select Client List

We work with leaders, entrepreneurs, intrapreneurs, and philanthropists across sectors helping to design, build and lead their organizations to accelerated social impact. These are some of the clients with which we've been privileged to work.

- ▶ adidas
- ▶ Agriculture & Agri-Food Canada
- ▶ B Lab
- ▶ BC Cancer Foundation
- ▶ Cancer Research UK
- ▶ Covenant House
- ▶ Doctors Without Borders
- ▶ Ecotrust
- ▶ HIV/AIDS Alliance
- ▶ MEC
- ▶ J.W. McConnell Family Foundation
- ▶ New Resource Bank
- ▶ Nordea
- ▶ Sentebale – The Princes' Charity
- ▶ Social Venture Circle
- ▶ The Body Shop
- ▶ The Guardian
- ▶ UN Principles on Responsible Banking
- ▶ United Way Social Purpose Institute
- ▶ Vancouver Coastal Health
- ▶ Vancouver Foundation
- ▶ World Federation of the Sporting Goods Industry



# Agenda

## Planning Your Work When You Don't Know What's Coming

- ▶ Defining “Strategy”
- ▶ Four Myths and How to Manage Them
- ▶ Q&A
- ▶ Opportunities to Go Deeper

# What is 'Strategy'?



# Strategy

*strat-i-jee*, noun: A plan of action to achieve a desired goal.

- ▶ “A plan...” singular! Not half a dozen plans!
- ▶ “...of action”—not mere ideas or wishful thinking!
- ▶ “...to achieve a desired goal”—aligned toward a meaningful outcome.





# Strategic Plan

A guiding document that defines an organization's approach to fulfill its mission and achieve its vision.

It answers a few important questions:

- ▶ Why does our organization exist?
- ▶ What do we hope to achieve?
- ▶ What must we learn, and what work must we do to achieve our vision?
- ▶ What principles will guide our approach to the work?





# Strategic Planning

The process of strategic planning is like an extended conversation with stakeholders, designed to optimize the organization's work.

- ▶ Inclusive of diverse stakeholders.
- ▶ Open and transparent as possible.
- ▶ Prioritize milestones, capabilities, and initiatives.
- ▶ Begin with the end in mind—the 'enduring benefit.'

# Myth #1: Strategy is for 'The Big Guys'



# Myth #1: Strategy is for 'The Big Guys'

Purpose

Vision

Mission

} Values {

Value  
Proposition

Brand  
Narrative



# Myth #1: Strategy is for 'The Big Guys'

**Purpose**

**Vision**

**Mission**

} **Values** {

**Value  
Proposition**

**Brand  
Narrative**



# Myth #1: Strategy is for 'The Big Guys'

Purpose

**Vision**

Mission

} Values {

Value  
Proposition

Brand  
Narrative



# Myth #1: Strategy is for 'The Big Guys'

How will the world  
be made better by your work?



# Four Rules for Strong Vision Statements

How is the world made better by your work?

- ▶ **Aspirational:** Lofty and bold!
- ▶ **Actionable:** Can you make progress every day?
- ▶ **Clear:** This is a jargon free zone!
- ▶ **Concise:** Seven words. Not a single word more.





# Myth #1: Strategy is for 'The Big Guys'

Vision

**Mission**

} Values {

Positioning

Narrative









# Myth #1: Strategy is for 'The Big Guys'

What work are you uniquely able to do, in pursuit of your vision?

# Myth #2: “Culture Eats Strategy”



# Myth #2: Strategy is Analytical

Purpose

Vision

Mission

} **Values** {

Value  
Proposition

Brand  
Narrative



# Myth #2

Values

Principles

Behaviours



# Myth #2

## Core Values

We work with **purpose**.  
We **aspire** to improve.  
We cultivate **belonging**.  
We are **genuine**.

## Baseline Values

Integrity  
Honesty  
Respect





# Myth #2

## Values

We cultivate **belonging**.

## Principles

We meet everyone with empathy, acceptance, and respect. We work with others to build more welcoming and inclusive communities..

## Behaviours

We embrace diversity. Come as you are!

We work to break down the barriers that hold back equity, justice, and a sense of belonging.

We celebrate and enhance people's unique strengths, so they reach their full potential.

We respect the identities and traditions of diverse cultures.

# Myth #3: Strategy Precedes Branding









# Myth #3: Strategy Precedes Branding

*Brand*, noun: The public face of strategy.

- ▶ Your brand is not merely your logo.
- ▶ At its essence, it's the narrative that engages your stakeholders.
- ▶ The expectation of an experience.

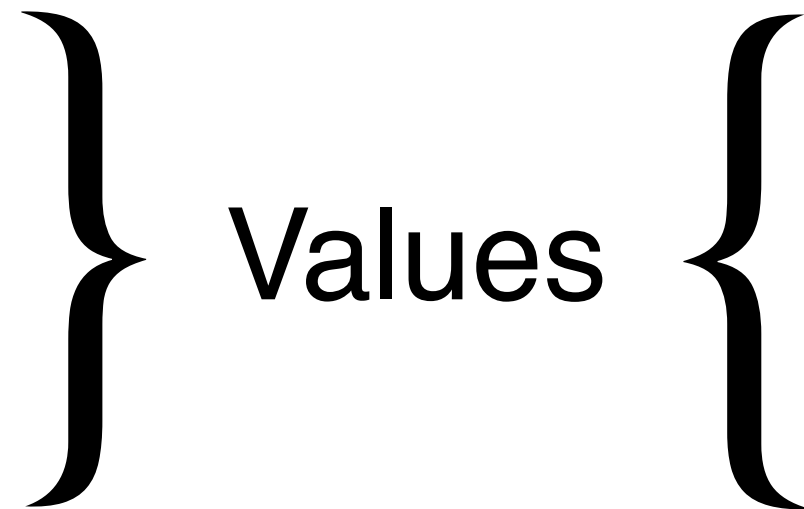


# Myth #3: Strategy Precedes Branding

Purpose

Vision

Mission



**Value  
Proposition**

Brand  
Narrative

# Myth #4: Strategy Precedes Implementation



# Myth #4: Strategy Precedes Implementation

## Management Domains

- ▶ Revenue
- ▶ Operations
- ▶ Communications
- ▶ People
- ▶ Finance





# Myth #4: Strategy Precedes Implementation

What's the one thing your organization can achieve this quarter to accelerate toward your vision?









# Myth #4: Strategy Precedes Implementation

**Thematic Objective:** Cast off the Bowlines...

**Thematic Goals:**

- ▶ Establish our 2018 budget
- ▶ Secure new debt financing
- ▶ Launch & complete a beta test of a new Affiliate program
- ▶ Complete documentation of our consulting approach



# Myth #4: Strategy Precedes Implementation

## Scorecard:

- ▶ Thematic Goal
- ▶ Thematic Objectives
- ▶ Standard Operating Objectives
- ▶ RACI Table
- ▶ Space for semi-monthly meeting notes



# Myth #4: Strategy Precedes Implementation

## What's RACI:

- ▶ Responsible
- ▶ Accountable
- ▶ Consulted
- ▶ Informed



# Myth #4: Strategy Precedes Implementation

## Meeting Rhythm:

- ▶ Biennial strategic planning retreat – two days
  - ▶ Define the key capabilities and action areas to develop toward our vision
- ▶ Annual business planning retreat – two days
  - ▶ Review the strategic plan & define annual targets
- ▶ Quarterly theme-setting offsite – half day
  - ▶ Review past quarter's performance, set initiatives for next quarter
- ▶ Semi-monthly team check-in – one hour
  - ▶ Check-in on progress and lend mutual support

# Agile Strategy

Planning Your Work When You Don't Know What's Coming

## Agile Strategy....

- ▶ Not just for 'The Big Guys.'
- ▶ About what you'll do *and* how you'll do it.
- ▶ Engages Stakeholders.
- ▶ A rapid cycle rhythm of learning and responding.
- ▶ Focused on short term needs *and* long term value.



# Questions?



VANCOUVER | TORONTO | LONDON



# Thanks!

[junxion.com/agilestrategy](http://junxion.com/agilestrategy)

[mike@junxion.com](mailto:mike@junxion.com)

+1 (778) 882-8594



VANCOUVER | TORONTO | LONDON

