

SOCIAL VENTURE INSTITUTE HOLLYHOCK

# Agile Strategy for the Social Venture

SEPTEMBER 19, 2024





## 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.

- ▶ Partner & CEO, Junxion Strategy
- ▶ Treasurer & Past-Chair, Hollyhock
- ▶ Director, ORS Impact
- ▶ Ambassador for 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 25 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, The Guardian, The Body Shop, and United Nations, to name a few.

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 founding 'champion' of the Canadian Purpose Economy Project, a long-time member and advocate for the Wellbeing Economy Alliance, and is an award-winning, 'Best *for the World*,' Certified B Corp.







adidas



The Guardian



INTERSPORT



coastcapital



wjs  
Canada



Artfinder



Nordea



colart







## Agenda

How to Plan When You Don't Know What's Coming....

- ▶ Debunking Four Myths About Strategy
- ▶ Q&A Along the Way
- ▶ Tools & Opportunities to Go Deeper





**Myth #1: Strategy  
is for the Big Guys**



# What is Strategy?



## What is 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.





## What is a 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?



## What is Strategic Planning?

An extended conversation with stakeholders designed to optimize the organization's work.

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



# Where Should You Start?

Purpose

Values

Vision

Value Proposition

Mission

Brand Narrative





# Where Should You Start?

Purpose

Vision

Mission

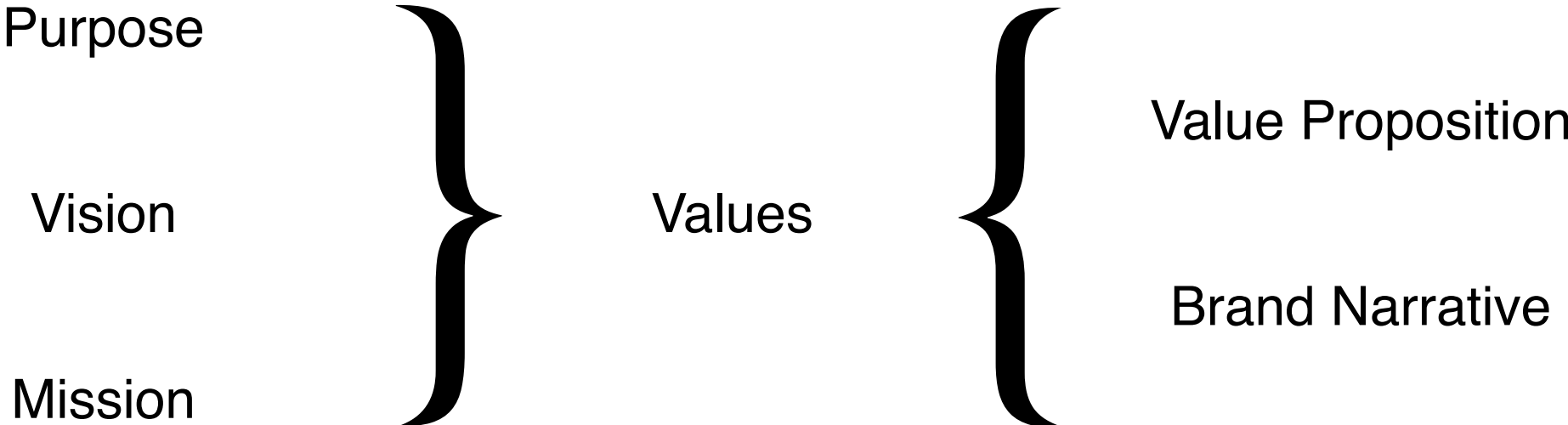
Values

Value Proposition

Brand Narrative



# Where Should You Start?





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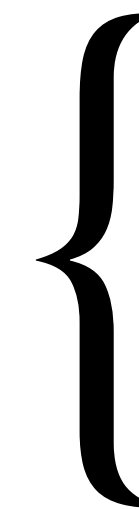
Purpose

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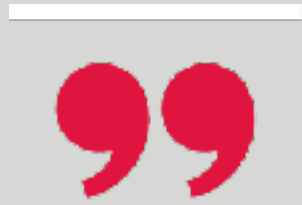
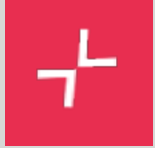
Value Proposition

Brand Narrative





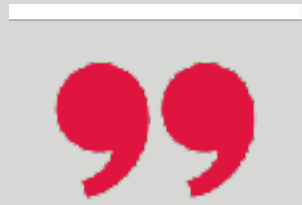
# What is Purpose?



A Social Purpose Business is a company whose enduring reason for being is to create a better world.

It is an engine for good, creating social benefits by the very act of conducting business. Its growth is a positive force in society.

**—UNITED WAY BC SOCIAL PURPOSE INSTITUTE**



A Social Purpose Business exists to solve the problems of people and planet profitably, and not profit from causing problems.

—**BRITISH ACADEMY**  
Principles for Purposeful Business

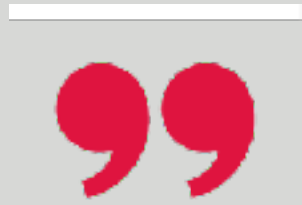
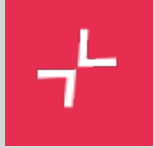










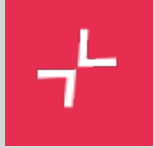


The Social Purpose Business's reason to exist is to make an optimal, strategic contribution to the long-term wellbeing of all people and the planet.

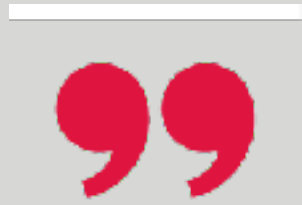
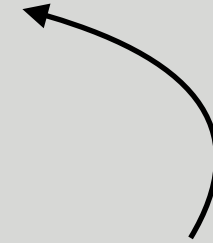
—**BRITISH STANDARDS INSTITUTION**

Dr. Victoria Hurth, Cambridge Institute for Sustainability Leadership





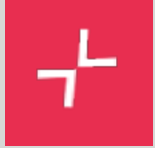
Optimized for the scale  
of the company.



The Social Purpose Business makes an **optimal**, strategic contribution to the long-term wellbeing of all people and the planet.

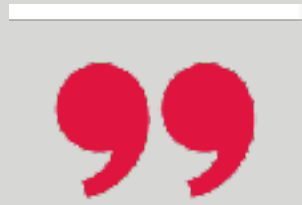
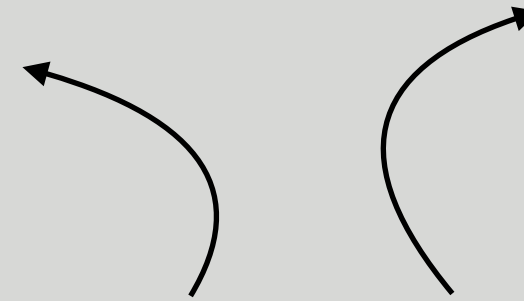
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Optimized for the scale  
of the company.

In pursuit of  
a meaningful end



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Surely the definition  
of the purpose  
of society as a whole

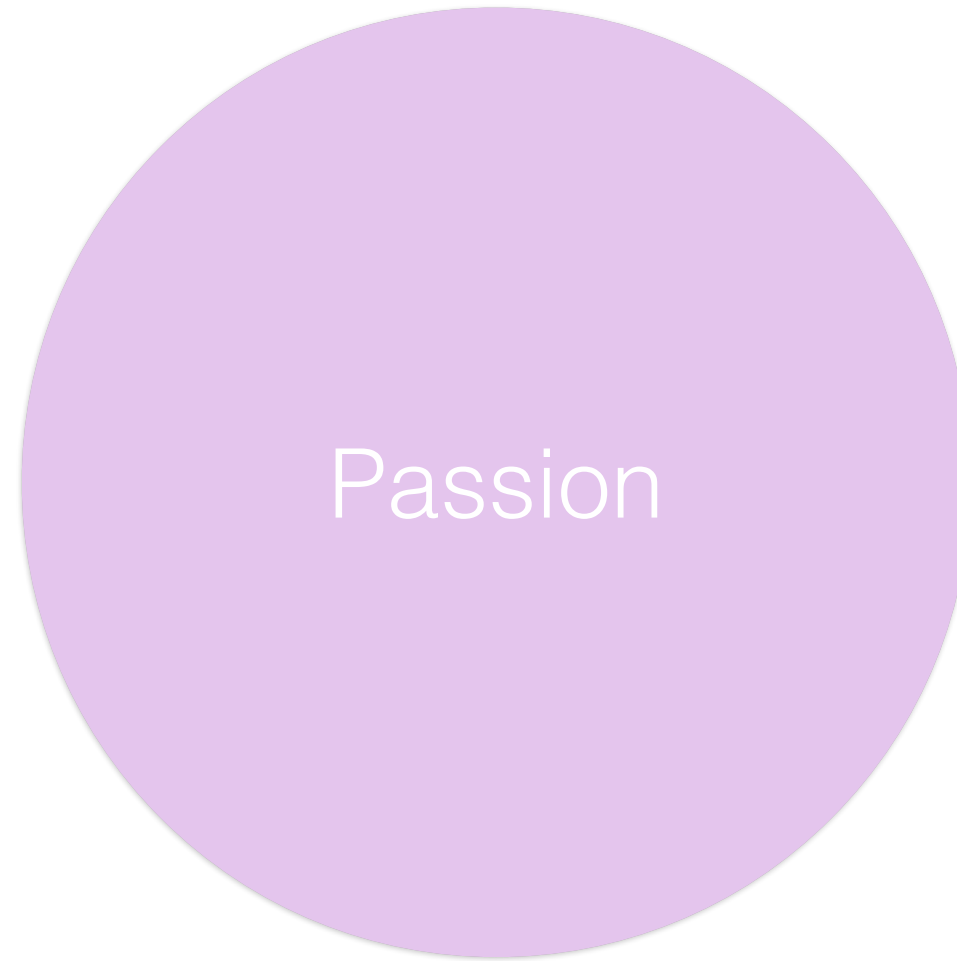


# How Do We Find Our Venture's Purpose?



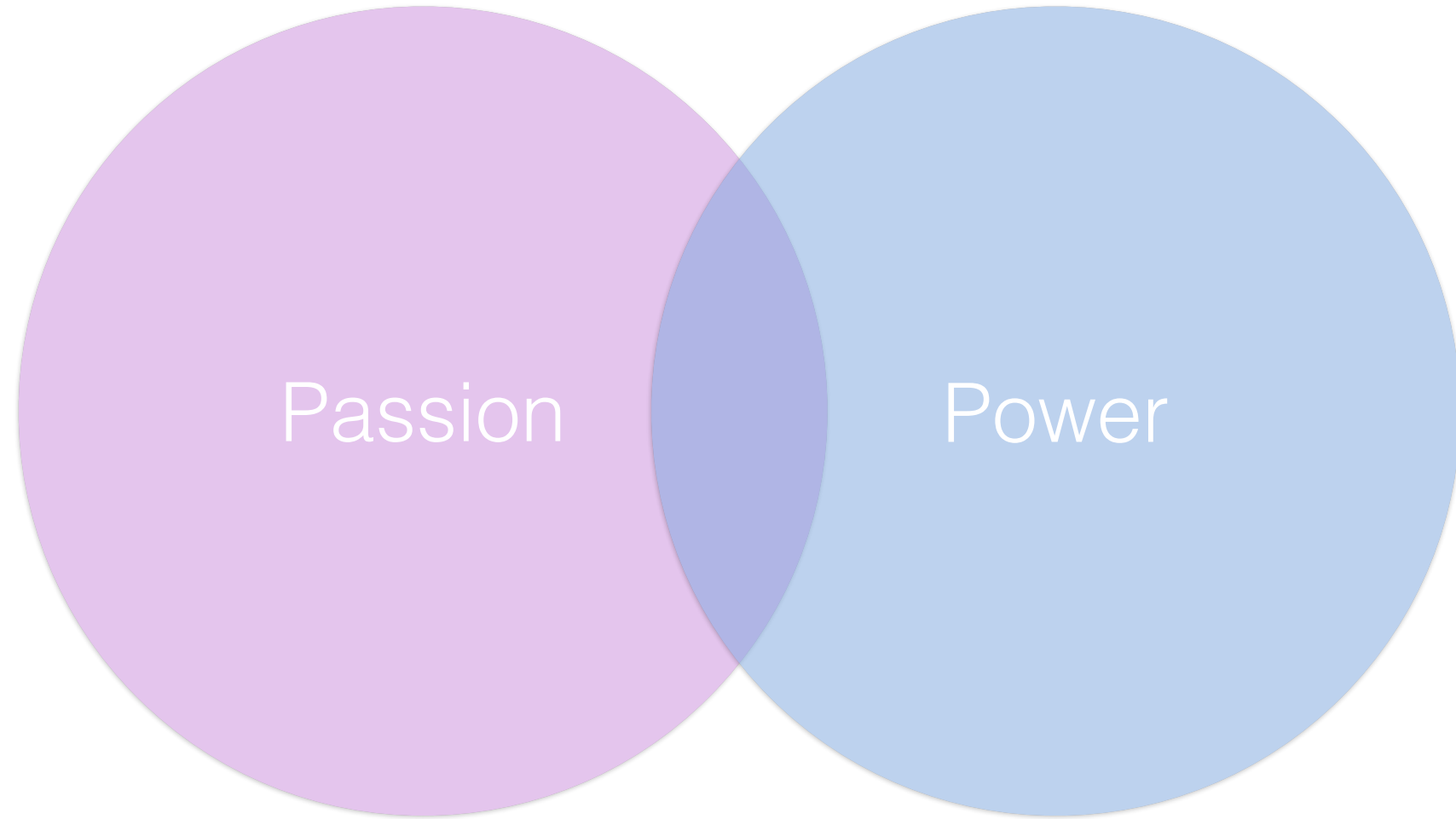


# Defining Your Purpose



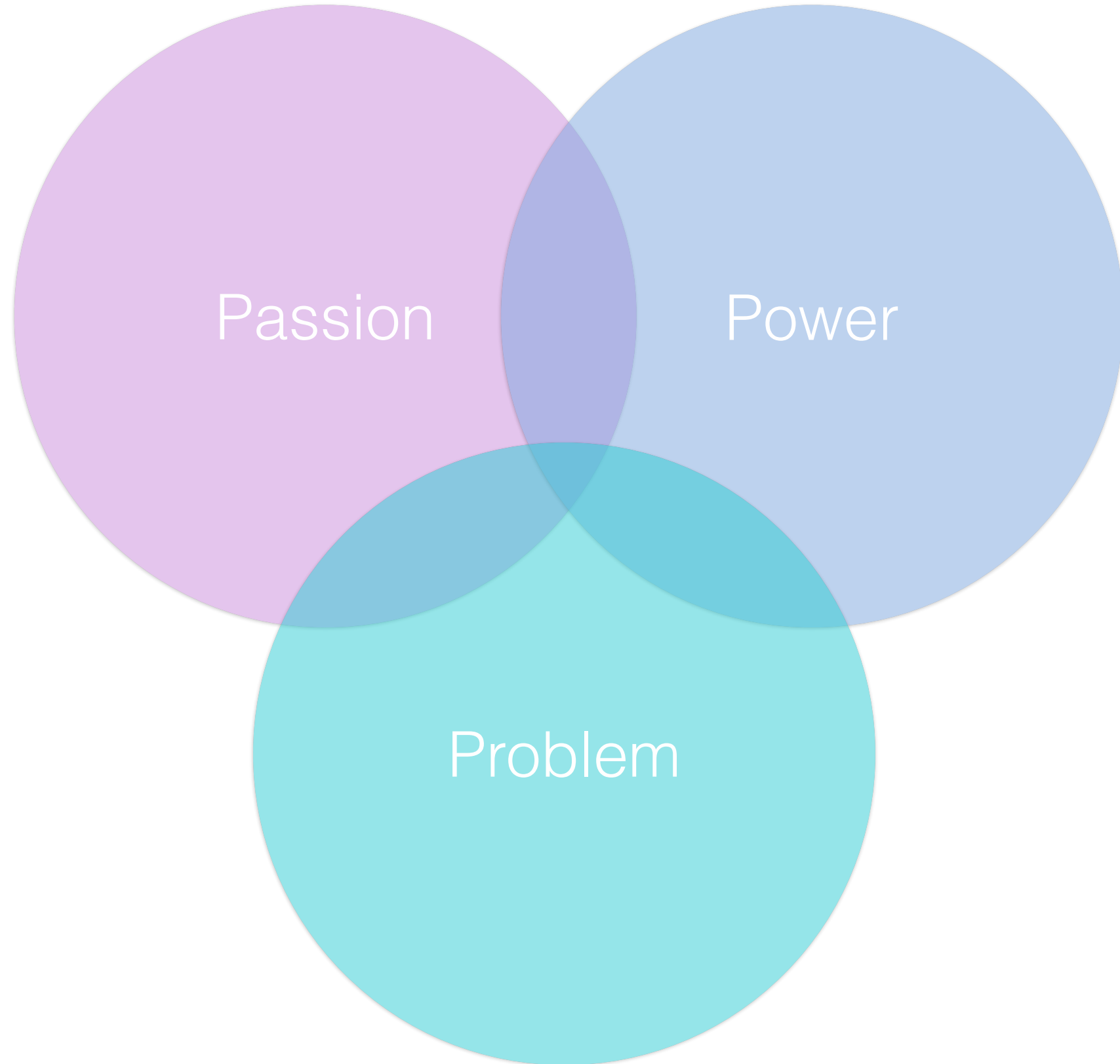


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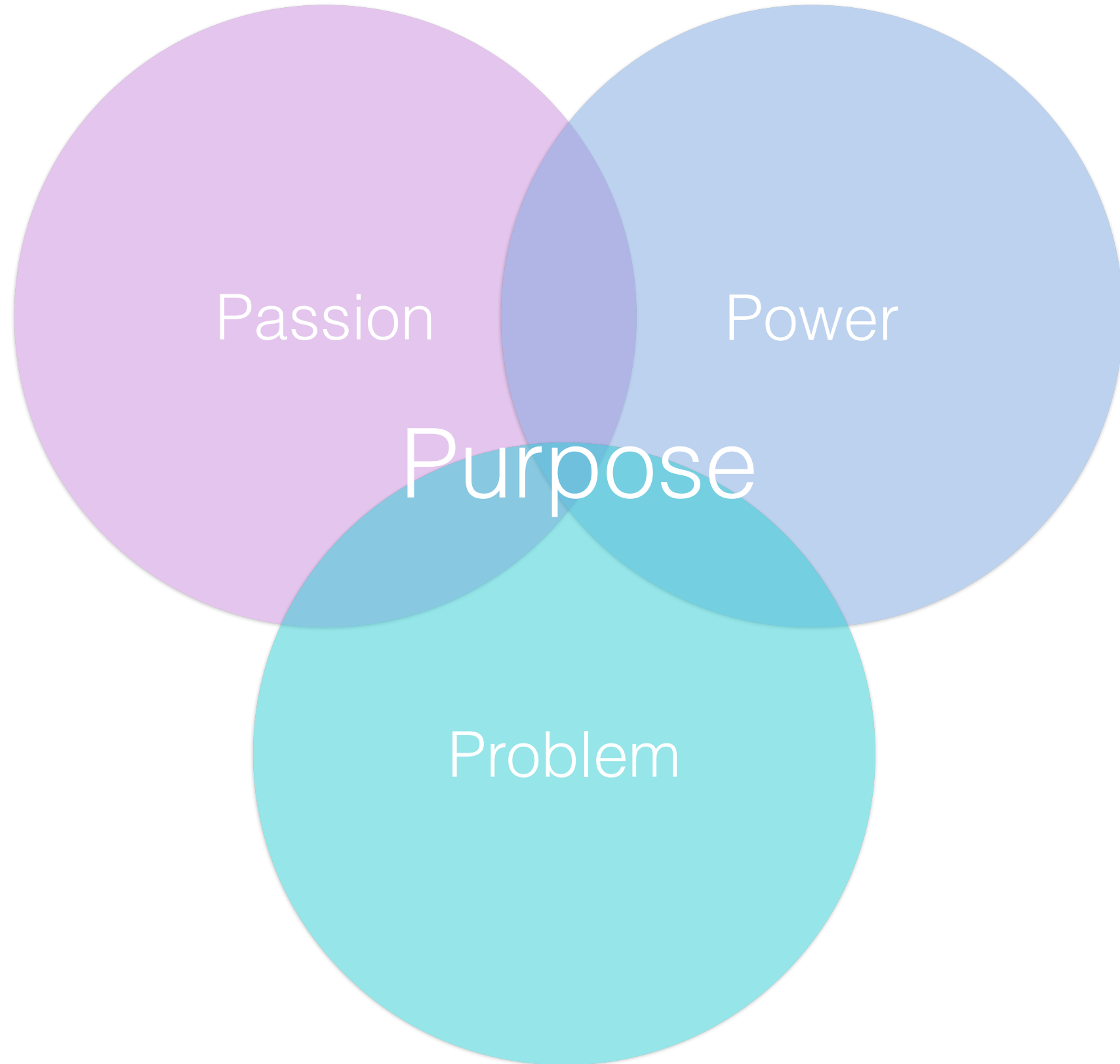


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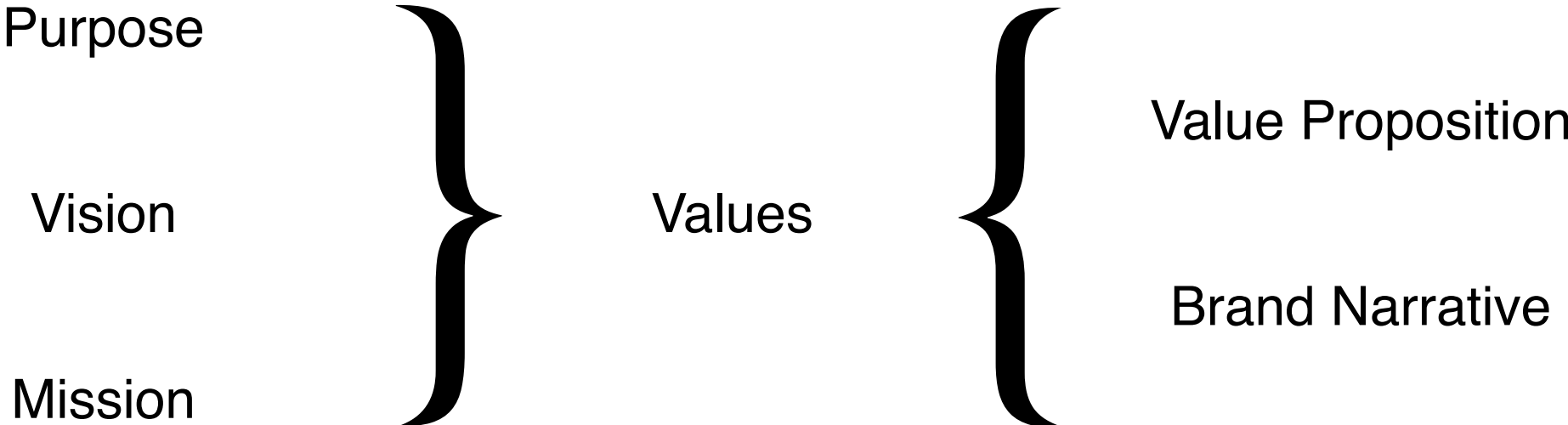




**What's Next?!**



# What Comes Next?



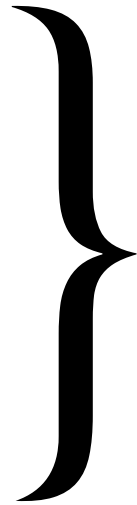


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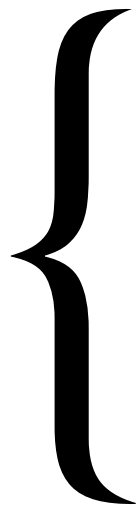
Purpose

**Vision**

Mission

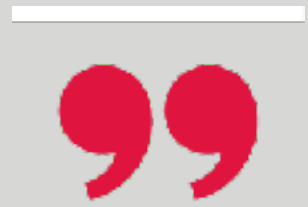


Values



Value Proposition

Brand Narrative



How will the world be made better by your work?



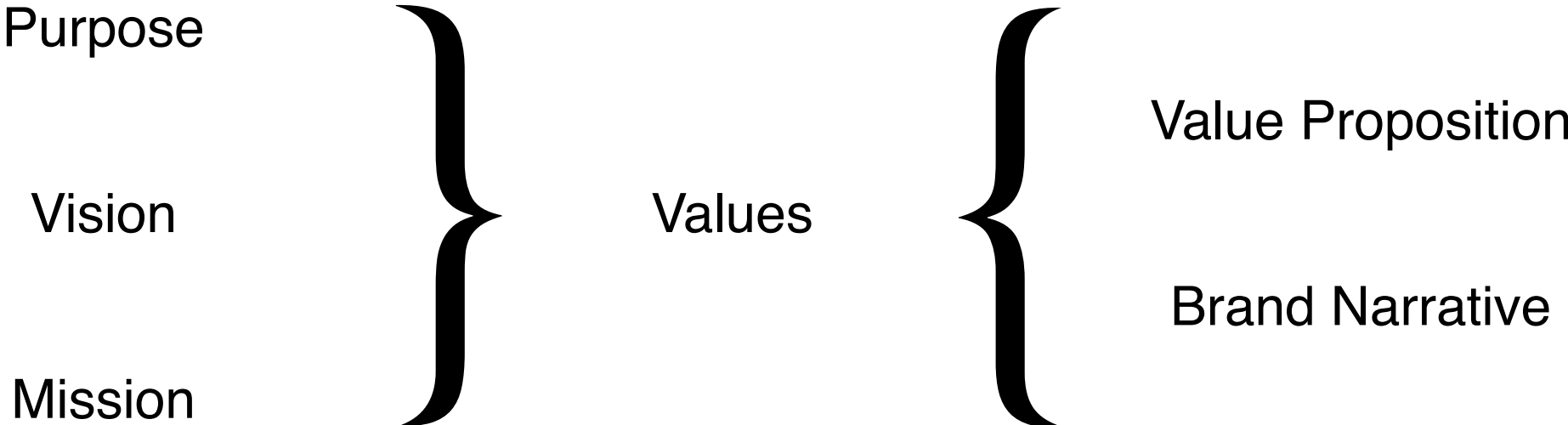
## Guidelines for Effective Vision Statements

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.



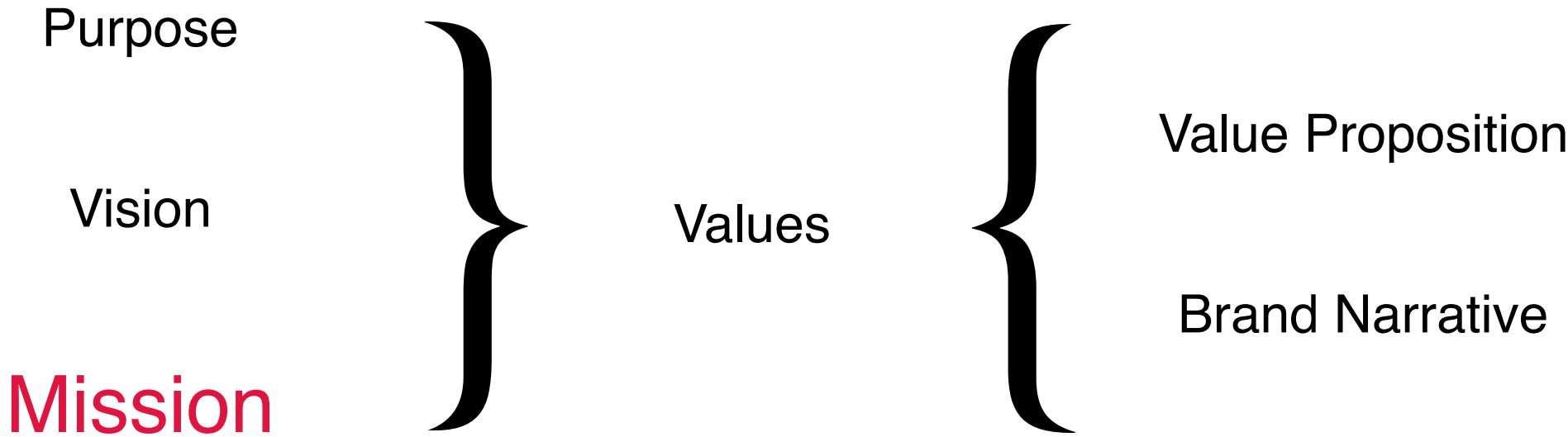
# What Comes Next?







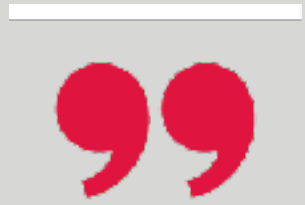
# What Comes Next?











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



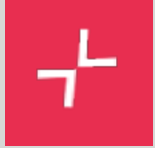
## Is strategy just for ‘the big guys?’

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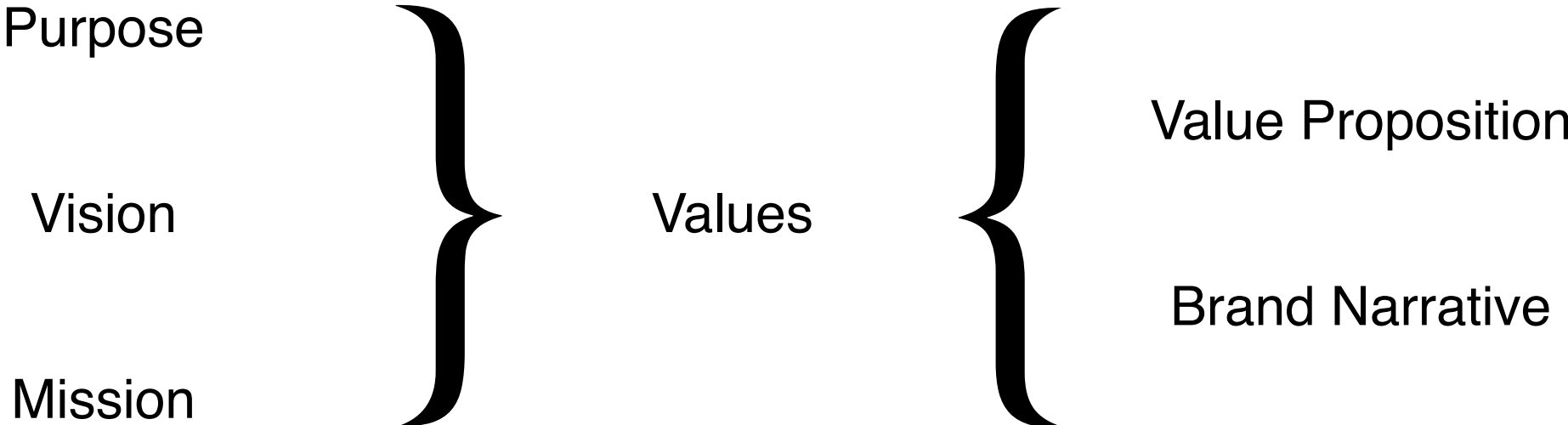
# **Myth #2: Culture Can Wait**



” Culture eats strategy for breakfast.”



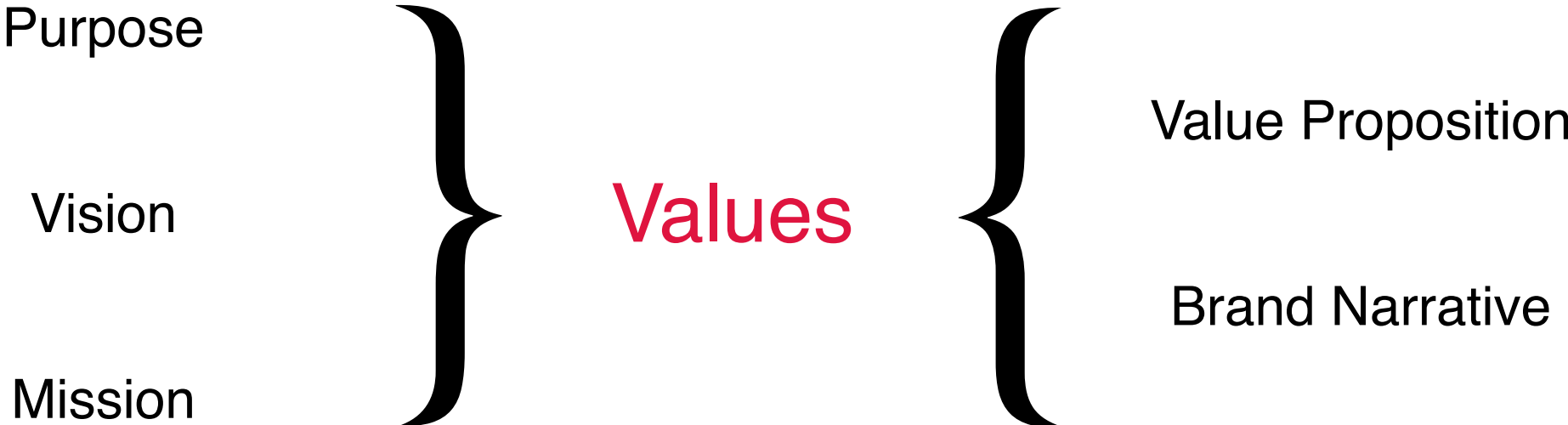
# What Comes Next?







# What Comes Next?





## Immigrant Services Society of BC

“We all thrive together in community.”

When organizational values are articulated well, they support a healthy, vibrant culture by shaping decisions, engagement, and behaviours.

If strategy is *what* we’ll do, values are the equally important *how*....

There are four types of values:

- ▶ Baseline values
- ▶ Core values
- ▶ Aspirational values
- ▶ Accidental values





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When organizational values are articulated well, they support a healthy, vibrant culture by shaping decisions, engagement, and behaviours.

If strategy is *what* we’ll do, values are the equally important *how*....

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





## Immigrant Services Society of BC

We work with purpose

- ▶ We recognize we're all connected to an effort that's greater than each of us.
- ▶ We are thoughtful and deliberate with our choices.
- ▶ We pursue change for the better.
- ▶ We build enduring relationships.





## The GUIDE Framework

Principles should be...

- ▶ Guiding—ie. ‘do this.’
- ▶ Useful—ie. doable!
- ▶ Inspiring—ie. they say what matters.
- ▶ Developmental—ie. relevant as the context shifts.
- ▶ Evaluable—ie. measurable.





**Myth #3: Strategy  
Comes Before  
Branding**





# What's a Brand?





## What's a Brand?

*Brand*, noun: The public face of strategy

- ▶ It's more than a logo, colour palette, and fonts.
- ▶ It's more than a slogan or marketing campaign.
- ▶ It's a toolkit for stakeholder engagement.

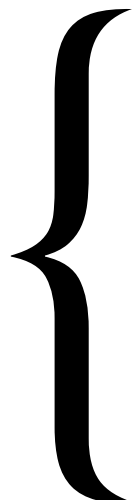


# Where Should You Start?

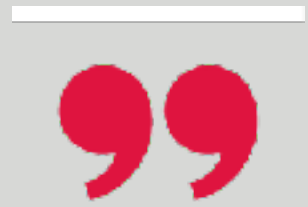
Purpose  
Vision  
Mission



Values



Value Proposition  
Brand Narrative



If you closed your doors tomorrow, who would miss you? And why?





**Myth #4: Strategy  
Comes Before  
Implementation**









## 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.



## “Working *on* the Business....”

### Agility has a 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

A	B	C	D	E	F	G	H	I	J	K	L	M	
<b>[Insert Thematic Goal Title Here]</b>													
Team Scorecard													
[Insert Team Name Here]				In the queue.									
[Insert Scorecard Time Period Here (eg. Q1 2022)]				In process.									
				Completed.									
			<b>RACI means....</b>										
			Responsible: The person (or people) who performs an activity or does the work.										
			Accountable: The one person who is ultimately accountable for the work being completed. They oversee the responsible party (or parties) and assess the accuracy and completeness of the work.										
			Consulted: These whose expertise or experience should be considered during the project. They may be sought out for feedback or to contribute to the ongoing activities.										
			Informed: These people who need to be made aware when the work is complete—or when interim milestones are achieved.										
<b>Thematic Objectives</b>			<b>Responsibility Matrix</b>					<b>Comments</b>					
			<b>R</b>	<b>A</b>	<b>C</b>	<b>I</b>							
<b>Thematic Goal #1</b>													
Project 1													
Project 2													
Project 3													
<b>Thematic Goal #2</b>													
Project 1													
Project 2													
Project 3													
<b>Thematic Goal #3</b>													
Project 1													
Project 2													
Project 3													
<b>Standard Operating Objectives</b>													
<b>Department #1</b>													
Key Performance Area #1													





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## Agile Strategy for the Social Venture

- ▶ Strategy is *not* just for the big guys.
- ▶ It's about what you do *and* how you'll do it.
- ▶ Includes the whole ecosystem or value chain.
- ▶ Includes a rapid cycle of learning and responding.
- ▶ Focuses on short term needs *and* long term value.



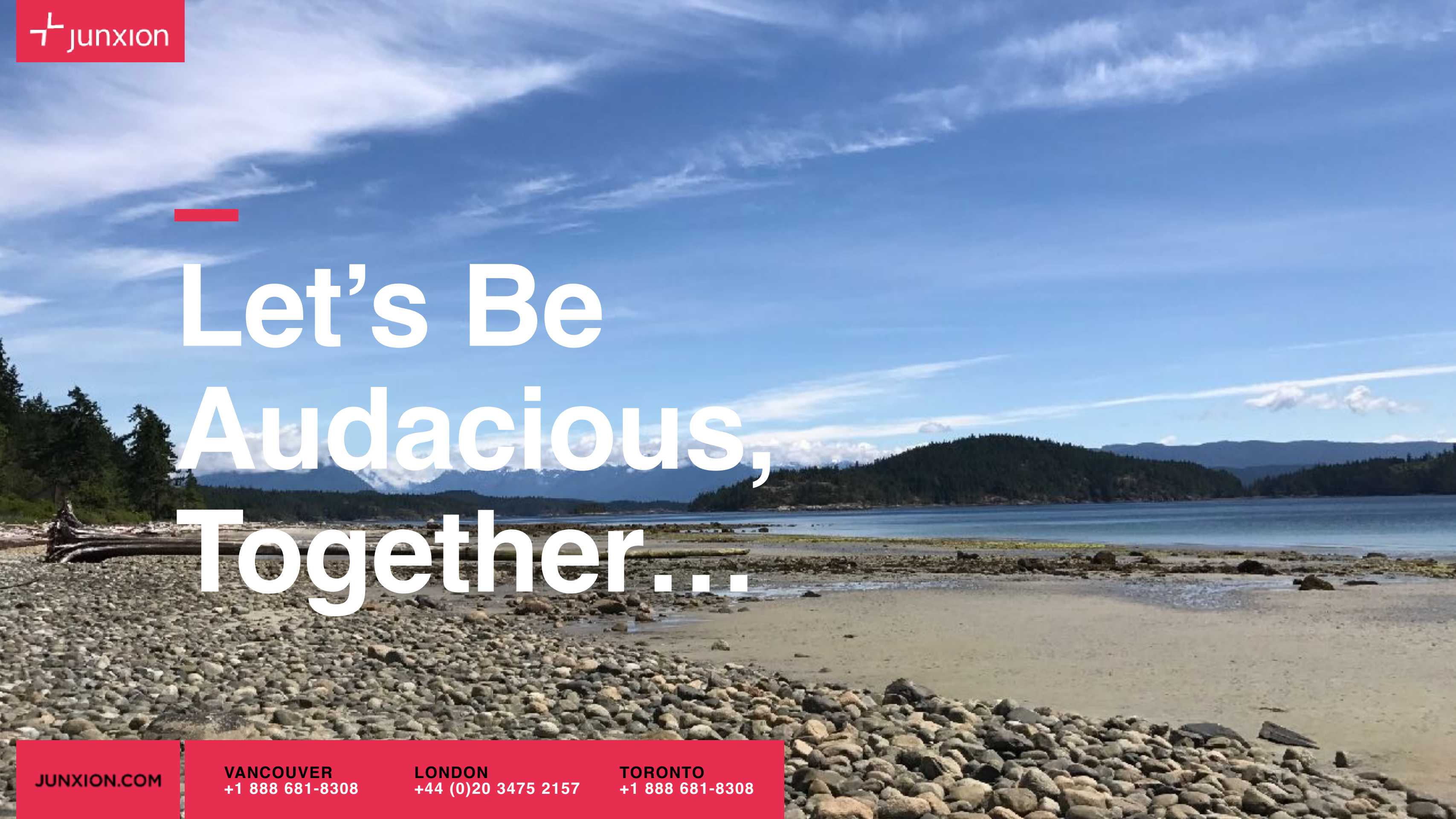


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## Tools & Opportunities to Go Deeper

- ▶ Visit [Junxion.com/AgileStrategy](https://Junxion.com/AgileStrategy)
- ▶ Download and use...
  - These slides.
  - Thematic Goal Scorecard.
  - *Finding Purpose: A guide for companies to drive value, improve lives, and restore nature.*
- ▶ Reach out to Junxion!
  - [mike@junxion.com](mailto:mike@junxion.com)





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