

Talent Advisory

Case Study

Strategic Planning for a US National Non-profit for Small Businesses Foundation

Background

The client is one of the largest non-profit organizations that helps small businesses in the Midwest & nationally to grow.

What was the exact ask

To help in their strategic planning exercise for two years and build an OKR for the executive team & functions like operations, training, marketing & finance.

The process

Worked with the executive board of the state chapter to plan for the chapter's strategy planning program, which had ~150 + business coaches impacting 50,000 businesses nationwide. We helped the client bring together a core team who were enterprise heads and functional leads representative of their impact they bring to the business landscape. They were responsible for creating their functional and tactical strategies. Strategic planning started with setting strategy at the enterprise level, and that strategy was turned into actions including corporate vs. functional. The types of plans which were created were strategic & operational. We used a quarterly check-in model with the executive team to track performance against these plans.