



# THOUGHT LEADERSHIP

A Series of Papers developed to provoke thought

## The Essentials of Strategy



### Strategy

**Rosie Bishop**

**Dr Peter Moore**

**Lorna Pearcey**

**Professor Sharon Turnbull**

**Dr Ian Williams**



Learning differently  
Thinking differently  
Acting differently

## The Essentials of Strategy

---

### Summary

We define strategy simply as: 'where an organisation is going to and how it is going to get there.'

We concentrate on three practical tools that we use a lot in our work to develop strategy and help bring about strategic change: 'The Voyage', the 'Caplor Islands' and the 'Culture Tree'.

We highlight the importance of communication, including summarising with a 'Strategy on a Page' plus having a 'Plan on a Page'; this is a hallmark of our approach.

We underscore how organisational culture is frequently the most important point in successfully bringing about change; we encourage a soulful approach, one that takes into account thinking, learning and acting differently; one that is driven by the values and beliefs that people in an organisation believe in.

We encourage a dynamic, proactive and emergent approach where strategy is a regular and uplifting conversation across and beyond an organisation.

Remember that it is much easier to develop a strategy than it is to deliver it! The more fixed your strategy, the less adaptive it is likely to be, a challenge in today's fast changing and volatile world.

We also provide insights about some of the enduring strategy models that are often used internationally.

At the end, we encourage leaders to humanise their organisations, realise the creativity of their people, and think about how to deliver a sustainable future given the acute environmental challenges faced.

We highlight the importance of a clear purpose, values and beliefs, mission and envisaged long-term future to complement the usual shorter-term strategy cycles (often 3–5 years). We also reinforce the need for adaptability, resilience, and innovation.

## Introduction

*'There is no scientific answer for success. You can't define it. You've simply got to live it and do it.'* Anita Roddick

We define strategy simply as: 'where an organisation is going to and how it is going to get there.' We see it as a journey and use the metaphor of a Voyage (right) to creatively consider where organisations might sail in the future and where their ultimate destination may be. We see strategy as a matter of deciding an overall direction rather than just attempting to write down a detailed plan.

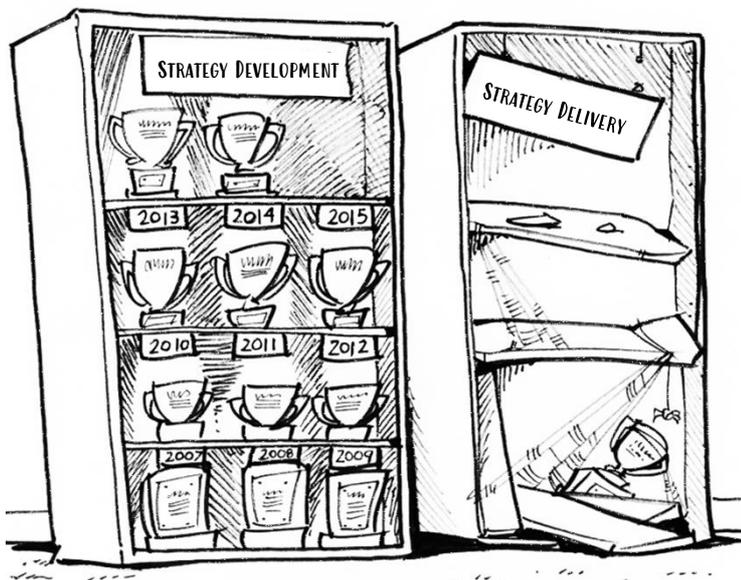


Another definition of strategy that we often use is: 'how an organisation in its entirety best directs itself in a changing world'. We recognise that the world around us is rapidly changing and that it is critical to take into consideration both the internal and external environment when developing and delivering a strategy. Organisations, and their strategies, need to remain adaptable, resilient, and innovative in order to remain relevant within an ever-changing external context.

Strategy is a word that has become controversial in some instances. Today's world has been turned on its head by the coronavirus pandemic. Most organisations have had to discard or adapt their existing strategies. Moreover, taking into account the acute environmental and societal challenges faced – including escalating levels of poverty, human rights abuses and major issues of injustice, such as those epitomised by the 'Black Lives Matter' movement – we would encourage organisations to proactively consider how they can make them more ethical and sustainable.

This paper asks how can we think about strategy in a 'VUCA' world; a world that is so 'Volatile, Uncertain, Complex and Ambiguous? To what extent can strategy help us to ride today's storms and be ready for the future?

Traditionally, many have thought of strategy as something that is 'fixed' rather than a dynamic, emerging conversation across an organisation. In today's fast changing world, we recommend people revisit strategies every six months as a minimum to ensure they are still fit for purpose.



Organisations have sometimes developed strategies very successfully; in the not-for-profit sector – which we concentrate on – processes can often be very participatory. Like in the trophy cabinet shown, awards might be justifiably presented for the way in which they are formed. Often, however, these strategies fail at the next step: the delivery or execution of the strategy. In today's world many such discarded strategies are either evidence of poor communication (hence our passion for

keeping everything succinct, compelling and clear) or the result of not being responsive enough in a world which has taken even the most prescient amongst us by surprise. Our belief in the old norms of a relatively stable world is severely challenged.

At this moment in history, many of us are rethinking what it means to design and deliver a strategy. In this article we argue that the need for strategy is as urgent and alive as ever, but that we need to rethink what it means to create a strategy, and what purpose strategy plays in organisational effectiveness.

In our experience it is in the delivery of strategy where people most often get stuck, as the implementation of strategy inevitably requires leaders to learn how to lead change. As such this article gives significant attention to this. Nonetheless strategy cannot start at all without a process to develop it.

## Developing a Strategy

*'Another world is possible. On a quiet day I can hear her breathing.'* Arundhati Roy

Not-for-profit organisations and movements are about bringing about another world, believing it is possible and helping it breathe. In this context, effective strategies are important to responding to injustice, relating to humankind or the environment, and bringing about a sustainable future.

There are many benefits of having a highly engaging strategy development process. We encourage processes that build on strengths and are highly enjoyable, inclusive and dynamic. Furthermore, we believe strategy development provides a great opportunity to learn and strengthen teamworking. Every time we facilitate the development of a strategy, the 'process is as important as the result'; it is an opportunity for relationships to deepen and for people to become ever more effective strategists.

It is important to live your values as you develop the strategy. Challenge yourself to consider things that matter.

It is useful for all of us to continually question 'to what degree is unconscious bias playing a part in whatever we do?' This includes strategy processes. In this respect, see our Thought Leadership paper on ['Feminist Leadership – A post patriarchal paradigm'](#) and consider how to 'think, learn and act differently'. For instance, we encourage people to think through the lens of universally relevant feminist principles and to consider important environmental, development and human rights frameworks such as the Sustainable Development Goals.

Consider what is the soul of the organisation and how you are keeping in touch with this and nourishing it; to learn more read our Thought Leadership Paper on the ['The Leaderful Way'](#).

### **What are other benefits of an engaging strategy development process?**

1. The process enables you to reflect, to step out of your day-to-day work to recognise where the organisation is now and imagine where it needs to be.
2. This process provides an opportunity to engage and consult with colleagues and other stakeholders in meaningful ways. One international authority on the subject, put it that the only rule is to 'listen first and speak second'. Consider in your process how you are 'listening first and speaking second'.
3. The process can sometimes identify a need for changes that might otherwise have been camouflaged or overlooked; indeed, to consider the whole change process. In the not-for-profit sector strategy processes often include a review of organisational theories of change (please refer to our Thought Leadership Paper on ['Developing a Theory of Change'](#) for more insights).
4. The process can be an excellent opportunity to move through time to consider renewal regarding: (a) the past, including the origins of the organisation and the foundations of the culture, notably the values and beliefs; (b) the present, including your leadership, collaborations, team-working, current successes and failures; and (c) the future, including what opportunities or threats lie ahead; what events might change the trajectory or derail you from what you intend to do.
5. The process can encourage you to examine your assumptions about your stakeholders, partners, colleagues along with those whom you exist to serve; also, to examine your engagement with the environment and assumptions related to this.

6. The process can identify significant material to communicate your intentions and plans to the rest of the organisation and beyond.
7. By working with team members and key stakeholders during the development process, a spin-off is that you will learn more about each other, including the different skills and perspectives in your team, plus build trust and understanding.
8. More specifically, we encourage people and teams involved with strategy processes to consider their behavioural preferences as this can have a significant bearing on the nature of the strategy that emerges. We typically use one of our tools called the 'Caplor House'; this enables people to learn more about individual and team preferences; it can be very helpful to individuals for their personal development as well as being useful to the successful design and delivery of strategy. However, various other tools are useful in a similar way (e.g. Enneagram, Myers Briggs, Belbin and so on).
9. The process can be very important in practically considering the risks that the organisation faces; we recommend organisations consider their willingness to accept risk when drawing up their strategy.
10. The strategy development process can often be highly creative and inspiring. It provides an opportunity to connect with the essence of what is most important.

### **What are the most important elements to consider in developing a strategy?**

If the most important elements, or essence, of a strategy are agreed, the details can follow, notably those that will be included in annual plans that accompany budgets.

We consider the essence to include capturing why an organisation exists; this is most likely to motivate people, to grip their imagination and excite them. As such, it includes the vision; purpose and-or mission; values; beliefs; the organisation's call to action and its story; it also includes its envisaged future and strategic goals, objectives or priorities. To find out more, see Annex 1.

Different people define words like 'vision' in different ways. What matters is that the people involved internally, and the people you will be communicating with externally, understand whatever you generate.

For instance, the 'vision' of a not-for-profit is often considered to be an ideal situation that is brought about. It is something which it will contribute to but not necessarily realise as a result of its own endeavours or even as a result of its direct collaborations with others. As an illustration, the vision of

United Purpose (an international development not-for-profit) is: ‘a world where justice, dignity and respect prevail for all’. Often businesses have ‘visions’ which focus on something which they can more directly achieve as a result of their own efforts.

We encourage having all the most important information, or essence, on one page. We call this a ‘Strategy on a Page’ or SOAP for short. We then encourage organisations to capture their annual plans also on a page. We call this a ‘Plan on a Page’. An example of a ‘Strategy on a Page’ template can be seen below, and Caplor Horizon’s Strategy on a Page can be seen in Annex 2.



*Example 'Strategy on a Page' (SOAP)*

We recommend using short, compelling sentences, say around 8-10 words, as these are more likely to be memorable. Furthermore, keeping in mind that it is easier to remember three things than four or more, we prompt organisations to home in on, for example, three values.

In a similar way, we encourage organisations to develop three strategic goals (or up to five as a maximum); people find it hard to remember more than this.

We suggest starting from the end point and developing a clear description of what success would look like. We typically encourage organisations to envisage 1 year from now; 3-5 years from now; and 10 years from now. With the end point in mind, it is then a matter of considering, in the context of an ever-changing environment, how to get there, including what priorities and plans need to be focussed on.

Alongside a strategy on a page we typically encourage the development of a more detailed five- to ten-page document giving more insights. Examples are on our website.

Remember that ‘a picture speaks a thousand words’: as such consider written and other forms of communication carefully and creatively. We encourage having rich picture formats as well as narrative forms; moreover, having other expressions of strategy can be very important and it is necessary to consider this out the outset.

For instance, in working with a marketing federation led by women in The Gambia in recent years, the preferred form of sharing the strategy that was agreed was through song and dance. As a result, as well as capturing key points in writing, during the development process much time was spent thinking about how the strategy would be received in song and dance.

### **What tool can we use?**

As a way of developing strategy, and then adjusting the strategy amidst a constantly changing world, it may be helpful to use ‘The Voyage’ metaphor that we have developed.

The Voyage Board, pictured below, provides a creative way to explore past events, notice patterns and to strategise. It uses the metaphor of a voyage to explore, articulate and understand significant events and incidents which have shaped your experience to date; and to creatively consider where you might sail in the future.

Using the Board and the icons on the right, it encourages individuals or teams to consider their ultimate destination (the horizons), the benchmarks along the way (islands), the challenges and opportunities they may encounter (crocodiles and treasure chest), the resources they will need to get there (building the ship), how they might collaborate and communicate with others (the flying geese and whales). Visit our website to read [‘Voyaging to New Horizons’](#); this has detailed explanations of each of the icons.



The Voyage Board is one of many tools that can be used to consider the internal and external environment when developing strategy. We have found it works across many languages and cultures.

### Thinking about strategy holistically: the Four Ps of a Sustainable Future

When developing and delivering your organisation’s strategy it is important to consider the interconnected elements of achieving a sustainable future. For example, we believe successful and sustainable strategies are ones in which a healthy environment, economic prosperity and social justice are pursued simultaneously to ensure the well-being and a good quality of life of present and future generations.

As a result, we encourage organisations to consider the ‘Four Ps’ when developing their strategy. These are: purpose, people, planet and prosperity.

- **Purpose** – The north star of our vision compass symbolises guiding principles. It entails viewing all stakeholders as valued members of your community, working towards shared goals and a common purpose.

- **People** – tackling social injustice, addressing inequalities and promoting human rights wherever possible. Recognising the impact of present and future decisions on those with the smallest voices.
- **Planet** – treading as softly as we can on the Earth’s resources in as many ways as possible, looking after our fragile eco-systems and controlling our use of natural resources that future generations will depend on.
- **Prosperity** – ensuring that all human beings can enjoy equitable and fulfilling lives in harmony with nature. Employing existing resources optimally, so that a responsible and beneficial global economic balance can be achieved over the long term.



This concept was inspired by Ann-Marie Brouder, a leader in the global sustainability movement, as well as influences from John Elkington’s ‘triple bottom line’ (people, planet, profit), the 5P’s of the Sustainable Development Goals (People, Planet, Prosperity, Peace, and Partnerships) and the Brundtland Report’s definition of sustainability.

## Strategic Planning?!

One leading international writer on strategy argued that the idea of a 'strategic plan was an oxymoron' (a contradiction in terms). Reflect on this: a strategy is usually associated with something longer term and higher level whilst a plan is typically considered as something shorter term and operational. We think that this is a useful insight; as such, we often just refer to strategies and plans. However, the last thing we are concerned about, as mentioned earlier, is having unhelpful discussions about definitions: what matters is that a common or shared language of terms exists internally and externally.

Cynthia Montgomery in her book *'The Strategist'* warns of the pitfalls of relying on 'strategy as plan'. She reasoned that: *'with all good intentions, we had backed strategy into a narrow corner and reduced it to a left-brain exercise. In doing so, we lost much of its vitality and much of its connection to the day-to-day life of an organisation, and we lost sight of what it takes to lead the effort.'*

We believe, as Montgomery suggests, that as much, if not more, time should be spent by leaders thinking about how to enact and realise their strategies, how to overcome barriers and constraints, how to engage and energise people internally and externally, how to manage the culture, and how to lead the change process.

## Delivering the strategy and bringing about strategic change

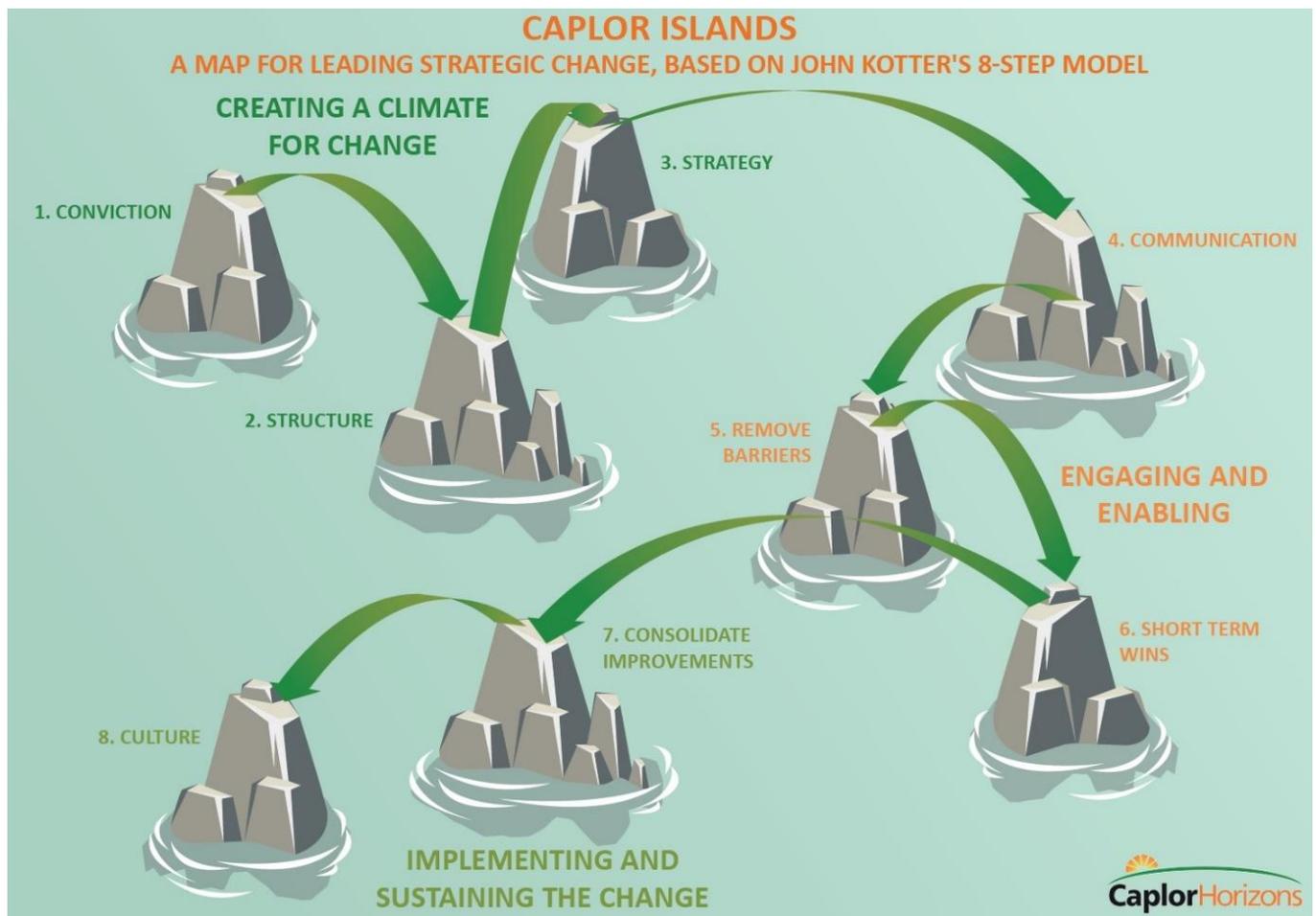
*'All organizations are a collective entity involving multiple people and processes working together for a common purpose. Leaders who genuinely serve others foster a strong sense of community by co-creating commitment to shared values. They have a wide repertoire of power and frequently draw on power within, with, for and through. In a collective mindset, anyone can step-up to serve the organization's leadership needs.'* Dr Lynne Sedgmore

Whilst many of the internationally available models and tools can be helpful for shaping productive debate and generating robust strategies with a compelling sense of common purpose, the danger is that leaders and teams sometimes believe that their strategy is done as soon as it is written down in a final form.

Sadly, as we know, and as the Covid-19 crisis and other severe disruptions have taught us, this is not the case; indeed, it is better that the strategic conversation does not stop and nothing is thought of as final. It does not matter how good a strategy looks, it counts for nothing if it cannot be realised. And there are many blocks to the successful delivery of a strategy, even in less turbulent times. We use our 'Caplor

Islands' model (depicted below) to illustrate this. Our model is based on the 8-Step Process of leading change introduced by John Kotter.

It picks up on our Voyage metaphor, introduced previously in this article; it links the key components of strategic change as islands along the way. Notably, the islands provide the opportunity to sail back and forward to wherever the ship needs to go to advance its journey – strategy is not a linear pursuit where 'a' is necessarily followed by 'b' and so on. An awareness of the eight islands enables leaders and teams to develop a deeper understanding of what is involved in delivering change. The islands can also act as an audit tool to facilitate the delivery of change – identifying strengths, opportunities and potential barriers. Three of the islands relate to “creating a climate for change”, another three are about “engaging and enabling” the change to happen, and the final two islands are about “implementing and sustaining the change”. Visit our website to read more about this tool, including detailed explanations of each of the islands.



## The paramount importance of culture!

*'One of the most calming and powerful actions you can do to intervene in a stormy world is to stand up and show your soul. Soul on deck shines like gold in dark times.'* Clarissa Pinkola Estés

It is often said, of all the elements involved with change, that the most important is organisational culture. It is one of the islands in the tool introduced above. We are often involved with helping organisations identify and strengthen culture. We have developed a 'Culture Tree' model based on the work of Johnson and Scholes. We focus on the roots of the tree which are about the values and beliefs of the organisation. However, the branches or other considerations about culture are all very significant too.



Here are some questions relating to each of the branches that might help you consider your organisation and how it can strengthen its overall culture...

- **Stories:** What stories do you commonly hear inside the organisation? Are there stories of charismatic leaders at times of crisis? Or of humble people delivering great work day to day? Or both? And what do the stories tell you about what it is like in this organisation?

- **Rituals and routines:** What are the key rituals in your organisation? What core beliefs and values do these rituals reflect?
- **Organisational structures and collaboration:** How is the organisation organised? How hierarchical or flat? Is it flexible or more fixed? Is it collaborative? Are partnerships with others the norm? Does it have the structures in place to inspire and enable collaboration?
- **Control systems:** What is most closely monitored, measured and controlled? Why? What does this say about what is important? In not-for-profit organisations, it is particularly important to consider inputs, outputs, outcomes and impact in relation to systems.
- **Power structures and collaboration:** How is power distributed in the organisation? Which areas, functions or individuals have most power to influence decisions and outcomes? Why? Is the organisation willing to share with others, synergise and collaborate effectively?
- **Symbols:** What do you see when you walk around virtually or otherwise? What does the brand tell you? How does the website look? What is on the walls? In the offices? How do people dress? What do these symbols tell you about the nature of the organisation and what is valued?
- **Soul:** What do all the different elements or branches and the roots tell you about the soul of the organisation? Can you describe the soul of the organisation? How well will this support the future strategy?

Caplor Horizons also has a 'Culture Assessment Tool' which helps you to diagnose your organisation's culture. Click [here](#) to access the tool.

## Leading change to deliver strategy

*'Do your best until you know better. When you know better, do better.'* Maya Angelou

Changing culture to support strategy takes time. The following are some brief tips for achieving a culture that supports your strategy. Caplor Horizons has a Thought Leadership paper devoted to ['Leading Successful Cultural Change that Lasts'](#); these tips are fully explored in that paper.

1. Diagnose your culture carefully before taking leadership action!
2. Learn to be both patient and persistent – do not give up!
3. Avoid confusing messages

4. Make sure that your leadership team is united - and address disagreements openly and quickly so that they do not fester
5. Think about your successor(s) early in order to ensure that you do not lose momentum
6. Make sure your processes, systems and procedures are aligned and consistent with the messages in your change programme
7. Avoid overpromising the outcomes of change – you risk causing disappointment
8. Make sure you build some flexibility into your change programme
9. Invest in your change programme over the long term
10. Be suspicious of simple formulae and management gurus offering you simplistic step by step organisational change processes

Caplor Horizons also has Thought Leadership papers related to this such as ['Understanding, Living and Leading the Values of your Organisation'](#).

## Conclusion

*'I know it is possible for leaders to use their power and influence, their insight and compassion, to lead people back to an understanding of who we are as human beings, to create conditions for our basic human qualities of generosity, contribution, community, and love....And I have studied enough history to know that such leaders always arise when they are most needed.'* Margaret Wheatley

We conclude that leading strategy is not a simple analytical exercise. Despite the many tools that suggest the contrary, strategy is a blend of thinking, feeling, knowing; and then acting; and, as we have shown, it draws on analysis, reflection, instinct and intuition.

We cannot make strategies in isolation. Nor can we assume that our plans will be implemented and realised. The essentials of strategy are that we have to use all our leadership capacities, and especially our capacity to learn, make sense and adapt.

Above all, we need to engage with others inside and outside the organisation. We need to understand the present but focus on the past and the future. The coronavirus pandemic along with growing concerns about climate change, biodiversity loss and other major global issues, has pushed many organisations out of their comfort zones.

Traditional organisations that cannot collaborate effectively are likely to struggle to change as fast as they need to, especially where leadership control resides only at the top, unless they unleash their people to follow their creative instincts and take leadership action at all levels.

We believe that everyone is a leader, that everyone has influence.

Hamel and Zanini's book 'Humanocracy' (published in 2020), makes a compelling case for a transformation in organisations. They appeal to organisations to allow the passion and creativity of human beings to take centre-stage. The principles they espouse include community, openness, experimentation and embracing paradox. They argue that we need to facilitate 'courage, compassion, and contrarian thinking'. Whilst this idea is not new, it is refreshing to read this idea being reinforced by two eminent strategists with global influence.

Many organisations and movements, such as the 'Black Lives Matter' movement, call for change in the world. We often use the notion of a second curve in our strategy sessions: we live in times that call on us all to make significant changes and to move onto a new or second curve. A second curve however does not always necessitate a new purpose. It might instead mean new ways to achieve our present purpose. To read more about the notion of a second curve read our Thought Leadership Paper ['A Conversation with Charles Handy'](#).

## Annex 1: What is the essence of a strategy and how can it be summarised on a page?

As mentioned, a useful tool for strategy renewal is the Caplor Horizons 'Voyage Board'. It uses the metaphor of a voyage to creatively consider where you might sail in the future and how you might get there. We use other strategy tools too. Please get in touch if you would like suggestions for processes you are involved with.

Beginning with the end in mind, we encourage everyone to think ahead about a how a strategy, once it has been formed, will connect with different audiences. Hence our focus on communication.

We reason that eight areas can usefully be focused upon in your discussions about renewing strategy. Each process is different. However, these eight areas cover the 'essence' of what is typically important.

We encourage organisations to summarise points onto one page. This is predominantly for communication purposes. We call this a 'Strategy on a Page' or 'SOAP'.

An outline for a 'SOAP' is captured in the image below. This highlights the eight areas: vision, purpose, mission, values, beliefs, story, envisaged future, strategic goals.



The summary strategy often has a three to five-year time horizon. Once this SOAP has taken shape, it is possible to extend this to generate fuller strategies. Typically, we facilitate processes to help organisations chart out higher-level strategic direction.

Once the medium to longer term is clear, we also encourage organisations to summarise key points onto a 'Plan or a Page' or 'POAP'. Again, this is predominantly for communication purposes. This usually has a one-year time horizon.

Once the essence of a strategy or plan is clear, the details can follow.

Strategy needs to remain relevant. As such, a flexible, iterative, dynamic approach is important in our fast-changing world. We encourage people to think of strategy renewal as a conversation across an organisation. We believe this should take place in a meaningful way at least once a year. Participation and buy in is important and there are various ways to bring this about. Please ask if you would like ideas.

The rest of this annex gives brief insights into what is involved with addressing each of the eight areas using icons from the 'Voyage Board' tool. Organisations are very welcome to use this in whatever ways would be useful. However, we encourage adaption of each point to the particular circumstances faced.

### Communicating the organisational story

- **Questions:** *What are the key elements of your organisation's story? How can these be best communicated in the organisation strategy?*



- For example, think about: transformational moments; inspirational examples; significant achievements; your distinctive approach; your 'unique selling point' and so on.

### Vision and mission

- **Question:** *What words or phrases would you use to describe the vision, purpose or mission of your organisation?*



- The **vision** is the overarching dream. It describes what your organisation aspires to achieve in the long run. During a strategy renewal process, this may remain the same as it was previously. For instance, the vision of United Purpose, an international NGO, is: *'a world where justice dignity and respect prevail for all'*.
- The **purpose** is the specific part of the dream that the organisation hopes to make real. A purpose outlines why the organisation exists: e.g., the purpose of Caplor Horizons is *'to inspire and enable leaders to deliver a sustainable future'*. If an organisation has a purpose it may not change for a very long time. Indeed, one leading strategy suggested the test of a good purpose is that *'you could return to it a hundred years later and it would still be the same'*.

- The **mission** operationalises the way in which the organisation plans to meet the vision and purpose – it is sometimes referred to as the ‘game plan’. This mission generally has a time frame of five to ten years, or sometimes longer. For instance, the mission of WaterAid, another international NGO, is: *‘to transform the lives of the poorest and most marginalised people by improving access to clean water, sanitation and hygiene’*.
- Oftentimes organisations do not have all of these: i.e. a vision, purpose and mission. If all three exist, they it is important that coherence exists between the three.
- Ideally eventual sentences in any part of the strategy, especially related to each of these (vision, purpose and mission), will be short, memorable and compelling; keeping in mind, for instance, that sentences with more than 8 words are rarely memorable; and that sentences with over 17 words can have a ‘fog factor’ with people losing track of the meaning.

### Values and beliefs

- **Question:** *What are the most significant values and beliefs that underpin the way that you work?*
- The **values** reflect the organisation’s core ideology – the principles, standards and qualities that characterise the way in which it conducts its work. And as a further example, consider the values of [Caplor Horizons](#).
- The **beliefs** are a statement of what an organisation believes or accepts to be true. To find out more about the difference between values and beliefs, click [here](#). As an example, consider the beliefs of a UK based charity called EAUC.
- We encourage organisations to consider the three most important values and three most important beliefs that are felt to be core to the organisation and why. It is important that coherence exists between organisational values and beliefs. For communication purposes, a ‘power of three’ is often referred to; this is insofar as three points can be highly memorable.



### Envisaged future

- **Question:** *What, specifically, will success look like in 3 years’ time?*
- Envisage the future 3 years from now. What will have been achieved? Begin with the end in mind. Try to be as specific as you can.



## Strategic goals

- **Question:** *What would be the overarching strategic goals to advance your strategy?*
- Try to identify the big picture goals (or objectives) rather than detailed or operational level activities. Ideally three strategic goals will be identified and no more than five. And it is important to then identify the practical and specific actions that will enable these goals to be attained.
- In developing strategic goals, we particularly encourage organisations to consider resources, collaboration, and key obstacles or threats. Hence the notes below on these...



## Resources

- **Question:** *What significant initiatives can your organisation take to increase progress on increasing and diversifying income streams?*
- Consider short-term 'quick wins and long-term initiatives, plus the 'return on investment'



## Collaboration

- **Question:** *What opportunities might there be in collaborating more with others, particularly strategic partnerships up to and including mergers?*
- In order to maximise energy, birds share the leadership when flying in a v-formation.
- Think about current partners/stakeholders and new collaborating partners. How might collaborating with others make you more effective? Who might these partners be?



## Obstacles

- **Question:** *What is happening in your wider environment and what risks might be 'lurking under the surface'?*
- Are there any vulnerabilities or threats that might harm new initiatives or prevent your progress?
- Think about how you can proactively overcome these challenges



## Caplor Horizons – Background

Established in 2014, Caplor Horizons is an independent charity. We work with other charities and responsible businesses and now have over 50 Advisors. These are outstanding people that bring specialist knowledge and experience. They contribute their time on a voluntary basis, or at reduced rates, so that Caplor Horizons can provide high quality and distinctive services at an accessible cost.

Working locally, nationally and internationally, we help other organisations think differently about themselves and the new horizons that they face. We support them in strengthening their leadership, renewing their strategy and improving their influence.

We want to encourage and assist a new generation of organisations that are committed to making a positive and lasting impact. We believe that if we are to achieve real, sustainable change, we need to inspire and enable people to learn differently, think differently and act differently.

**Our vision is:** *A world where leaders deliver a sustainable future for all*

**Our purpose is:** *To be courageous, compassionate and creative in facilitating transformational change*

**Our values are:**

- **Courage** – We are courageous change makers committed to challenging assumptions, taking risks and having difficult conversations
- **Compassion** – We are open, understanding and heartfelt, encouraging the nourishment of our whole selves and others
- **Creativity** – We learn, think and act differently, and are innovative and resilient in an ever-changing world

**Our beliefs are:**

- Through diversity we ignite dynamic innovation
- Collaboration helps achieve greater impact
- Everyone matters
- We are all leaders in our individual and collective ways – we are all change makers!
- Learning is more effective if it is fun, engaging and creative
- Building on people's strengths creates greater resilience

**Our strategic goals:**

- Goal 1: Transforming Leadership
- Goal 2: Strengthening Resilience
- Goal 3: Increasing Collaboration

Learning differently  
Thinking differently  
Acting differently

