



Meridian 1



Project Case History 1

Turning Strategy into Action at a Professional Association

This case history contains a summary of the work carried out by Meridian1 on behalf of a professional association in London with 600 members. It contains a description of the brief that was given, the approach that was taken and the results and outcomes achieved.

Case 1: Turning Strategy into Action

Background

The association had been in existence for over 40 years and had recently experienced a decline in membership that resulted in falling revenues. The reduced funds meant they were able to offer less services to members, which contributed to more people leaving. The Council of Trustees had identified that a new approach was required and produced some initial ideas for a business plan but were unsure how to complete the plan and turn it into action.

The Brief

The governing Council wanted help in answering three questions:

1. Is there a continuing role for the Association in the 21st century?
2. If so, what is that role?
3. What initial practical steps and/or projects should the Association take to confirm that role and start translating our embryonic Business Plan into concrete actions?

The Project

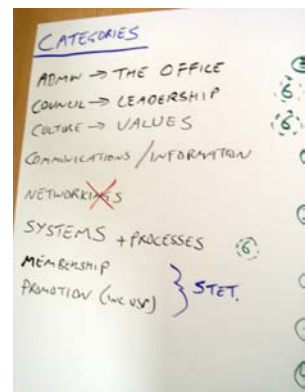
The purpose of this project was to define and initiate two or three practical initiatives to act as catalysts that would translate the Council's two year Business Plan into concrete actions. It was not intended to just be a strategic planning exercise, or a forum that only generated ideas without working out how to implement them.



The first phase of the project evaluated the existing ideas that had been generated by the Council. They were categorised using the constituent parts of the Association's purpose statement. Another key part of this phase was to interview the Council to draw on their experience and aspirations to ensure that the subsequent activity was focussed in the right areas. The final piece of work in this

phase was the design of a qualitative survey to engage the rest of the organisation, which was used, as a cornerstone of the next phase.

The second phase focussed on conducting the survey across a representative sample of the 600 members. This data was used to validate and refine the ideas developed in phase 1. At the end of this phase, the information was analysed and evaluated to select the initiatives that would make the biggest contribution to moving the organisation forward in the shortest time.



The third phase implemented three ideas that were selected from a final shortlist of twelve illustrates how the first step was taken in turning one of these ideas into action.

What?	Who?/With?	How?
<p>Definition</p> <p>Create a website that is first choice for Networkers and leaders in O.D.</p>	<p>Who (could/should)</p> <p>David</p> <p>The office</p> <p>Association members doing own profiling</p> <p>A Maintainer/Designer</p>	<ul style="list-style-type: none"> Decide: What are the elements of the website? Headings? Find a designer, who can continue to update it Re-design home page Find content for headings,
<p>Purpose (of the site..)</p> <p>A stimulating site, constantly updated with relevant knowledge for members of our network and others</p>	<p>What other resources will be needed?</p> <p>£2000 Designer/Editor/ £200 per month Amedtalk moderator £150 per month maintenance/webmaster £200 per month Journalist?</p>	<ul style="list-style-type: none"> Create/Paste in links Recruit writers in/outside Create/Maintain showcase/directory Find Editor/Webmaster/Journalist David do links
<p>Goals</p> <ul style="list-style-type: none"> Sharing of knowledge Member profiling Facilitate networking 	<p>What info. do we have/need?</p> <p>We have lots of links already, On-line news, Terry's input, and the e-bulletin.</p> <p>We need: free contributors and a 'thought for the day'</p>	<ul style="list-style-type: none"> Concepta – database info. Journalist provide/edit copy Office chase members for info FIND PEOPLE NEXT WEEK (Project Leader, designer, editor)
<p>Timescales</p> <p>2 months (to have something different on Home page (and poss. Others). Longer to have fully completed.</p>	<p>Workload (how much time)?</p> <p>Approx 10 hours per month per person paid work (1/2 day a month for 5/10 contributors) (excludes initial design)</p>	<ul style="list-style-type: none"> Conference moderator, maintenance, contributors, journalist. Benchmarking/milestone markers Assemble a team Champagne launch
<p>Success criteria</p> <p>1000 hits a week (in a years time)</p> <p>Councils personal satisfaction with look of site</p>	<p>Risks</p> <ul style="list-style-type: none"> Run out of money People don't deliver Nobody logs on 	<ul style="list-style-type: none"> Talk to designer, pdq Find contributors
<p>Vision (what will it look like?)</p> <p>Bright colours, 'sticky' (people stay on site), quiz, things to do, easy to navigate, different topics every day/week, leads people to other sites.</p>	<p>Constraints (time, place, cost, skill)</p> <p>Cost, time constraints, design to be updated/maintained how?</p> <p>Pilot in place for annual event</p> <p>=Editor role/director role?</p>	<p>The image is all-important – it's key.</p> <p>Find in a college, free resource?</p> <p>Sponsorship by some to fund a properly maintained site</p>

Table 1: Sample output - First step in translating an idea into a plan.

Results

The project had an impact in both the short term and over a longer period. The focus on three initiatives resulted in tangible improvements that gave the organisation the momentum and confidence to continue with further planned activities that built on the initial three.

This is a message from the Chairman to the Council following the final meeting of the project:

Dear all,

Following yesterday's challenging meeting in which we faced up to the precarious future of the organisation I am feeling good about the future.

I am impressed with the list of initiatives that people have volunteered to undertake as well as the content of several phone conversations I have had during the day with Council members, this gives me confidence for the future.

And... I have heard from Debbie today that we have had **8** new applications (**6** via the Website) to join in the past 24 hours. Assuming all convert to paid up members this makes an increase of **20 members** on the figures we looked at yesterday.

I think our short-term target of increased membership is achievable.

Best Wishes

David

This is a note to members from the Council to report on progress:

The project is already stimulating new action. Steve worked hard at herding cats (this is sometimes how our long and thoughtful Council meetings feel like to the person trying to make sense of it). He took the Council through an appraisal of the huge volume of ideas and initiatives that various groups and individuals had created en route to arriving at a crisp definition of our purpose and values. This provided a foundation for identifying and launching practical initiatives that would enable us to move forward.

And finally, this is what the Council had to say two months after the project was complete:

Dear Peter and Steve

Last week Bob, David, Frances and I met for a Council Meeting. We were very aware that we are in a different place from when we started working towards project Kick Start, last November. I was asked to write to you to express our sincere gratitude for all you have done for us.

The results of your work have exceeded what we had anticipated and hoped for from the project. We are still trying to assimilate the full impact of what you offered us. It will be some time before we are fully able to realise all the benefits from your work.

You were very generous with your time and energy and that, in my personal view, has rubbed off on a number of us.

Finally it would be good if you could join us on 21 July, to experience the energy you have inspired and to receive our formal thanks at the AGM.

Warmest regards and every good wish for your future business success.

John, on behalf of the Council

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