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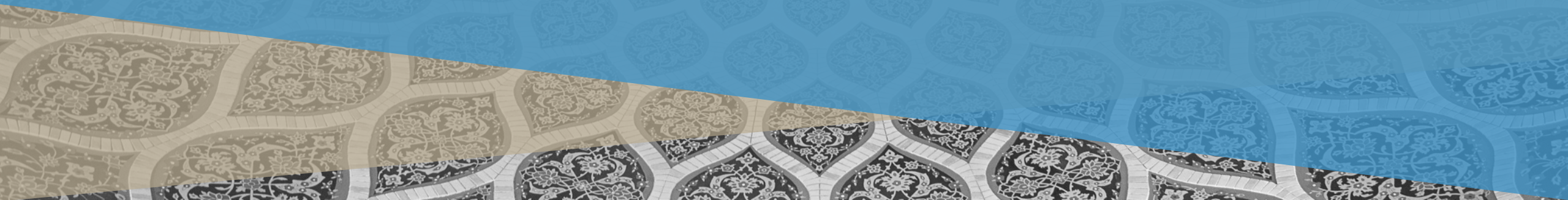
STRATEGY on a PAGE

SoaP Basics & Examples



WHAT IS A SoaP?

Purpose

- A Strategy on a Page (SoaP) is a one-page summary that visually displays the organization's strategy.
- Effective SoaPs are often the preferred tool for communicating a strategy throughout the organization and to stakeholders.
- The idea is to condense all the salient concepts of the strategy down to its simplest form so the strategy can be conveyed simply and succinctly.
- This simplest strategy format promotes laser-sharp focus on the organization's plan, priorities, and direction.

WRITING A SoaP

Elements

- The structure of the Strategy on a Page is designed to give your team a quick overview of your organization's core purpose, where you're going, and how you intend to get there.
- SoaP plans vary greatly from one another but may include these core elements:
  - **Mission**: The organization's purpose or reason for being.
  - **Vision**: The future of the organization.
  - **Values**: The principles and philosophical ideals that drive the organization.
  - **Focus Areas**: The largest and distinct segments of the strategy.
  - **Objectives**: Statements of what you must do well to achieve the strategy.
  - **Initiatives/Activities**: Actions an organization takes to achieve objectives.
  - **Metrics**: Key Performance Indicators (KPIs) that indicate progress/success.

WRITING A SoaP

Tips

- Reevaluate your strategic plan to begin to think about the most important strategic elements that you should include in your one-page document.
- If your organization has a balanced scorecard, the most important elements from the scorecard should be reflected in your SoaP.
- Decide what focus areas best tell the story of your organization's strategy.
- Decide what objectives are critical to the organization's success.
- Some organizations also include key initiatives in their SoaP.
- If you have major transformative initiatives which span across focus areas or across the organization, these can be shown in their own area on the SoaP.
- In general, break longer sentences into their core meanings to reduce the number of words used to describe objectives and initiatives.
- Weed out repetition and overlap from the list.
- Once the strategic plan is distilled to its essence, create a layout that expresses the plan in a simple and memorable way.

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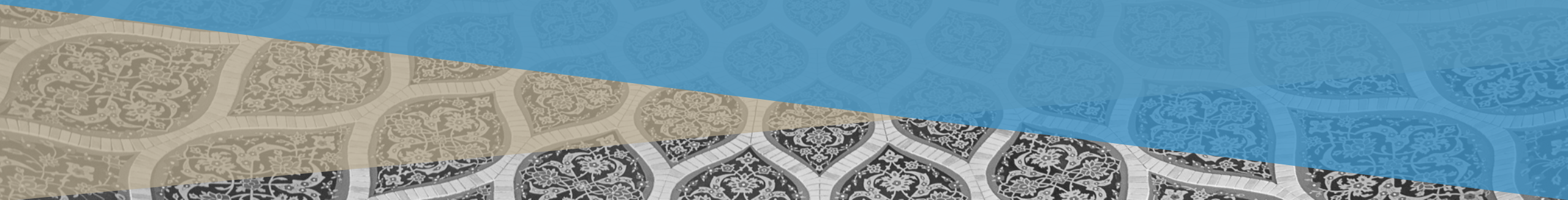
EXAMPLES



DES MOINES PUBLIC LIBRARY

WE INFORM AND INSPIRE THE CURIOUS

STRATEGIC PLAN 2021-2023

COMMITMENTS

COMMUNITY

- Connect people to information, ideas, and experiences
- Cultivate and grow local partnerships
- Promote outreach to engage with underserved communities

CUSTOMER EXPERIENCE

- Offer safe and welcoming spaces
- Provide superior library materials and services
- Implement innovative and impactful technologies

CULTURE

- Become a more diverse, equitable, and inclusive organization
- Develop a dynamic and high-performing team
- Enhance effective support for our stakeholders
- Create an environment where people and ideas thrive

CORE OPERATIONS

- Provide desirable digital and physical collections
- Increase accountability for all public and private resources
- Promote our offerings for maximum community impact
- Improve spaces that serve our community

HIGH-LEVEL INITIATIVES

- Increase information and digital literacy.
- Become a more diverse, equitable, and inclusive organization.
- Expand reach to underserved populations through outreach and partnerships.

MISSION

To strengthen our community by connecting people with ideas and the tools they need to enrich their lives.

VISION

To create a stronger, more dynamic Des Moines where everyone's potential is realized.

SoaP Reflections

Overall

- Intended for public, government and internal audiences
- Elegant design

Pros

- The most important elements of the strategy are shown
- Commitments are prominent
- Goals start with verbs

Cons

- No metrics to define success
- Logo doesn't standout

NATIONAL RURAL HEALTH ALLIANCE LTD STRATEGIC PLAN 2019-2022

VISION

Healthy and sustainable rural, regional and remote communities

PURPOSE

Advancing better health and wellbeing for rural, regional and remote communities through collaborative partnerships

VALUES

- Equity
- Inclusiveness
- Integrity
- Sustainability
- Evidence-informed policy & practic

STRATEGIC PRIORITIES

ADVANCEMENT

Lead efforts to:

- Improve access to high quality, affordable and integrated healthcare
- Champion models of care and service delivery options that are adaptable for different communities
- Increase recruitment and retention rates of a highly skilled, flexible health workforce
- Promote the expansion of training options, career pathways and support mechanisms for the health workforce
- Bolster funding opportunities for rural health research.

COLLABORATIVE PARTNERSHIPS

- Harness the collective intelligence of members, consumers and other stakeholders to build healthy, sustainable and adaptable communities.
- Grow the research and evidence base of rural health through collaborations.

CAPACITY BUILDING

- Facilitate collaborative decision-making and action between member organisations.
- Leverage the collective capacity of member organisations to support and strengthen the skills and competence of rural health practitioners.
- Safeguard the financial sustainability of the organisation.
- Strengthen organisational governance, policies and processes.

SoaP Reflections

Overall

- Intended for partner organizations and internal stakeholders
- Clean appearance

Pros

- Left to right flow is easy to read
- ‘Purpose’ in place of ‘Mission’
- Commitments are prominent

Cons

- Vision and Purpose are similar
- ‘Advancement’ is busy

THECHAMBER
WICHITA REGIONAL CHAMBER OF COMMERCE

Wichita Regional Chamber of Commerce

Strategic Plan 2021-2023

PURPOSE:
Success for our members
Leadership for our community
Prosperity for our region

GOALS

SMALL BUSINESS

Position the Chamber as the hub for small business

- Enhance the Chamber's value proposition for small business members
- Ensure access to high quality programming for networking, education and visibility

KEY METRIC:
86% membership retention

TALENT

Accelerate the engagement of talent in the region

- Collaborate with other organizations to engage and retain talent
- Provide expanded opportunities for leadership development
- Leverage W to engage young professionals in the Chamber and the community

KEY METRIC:
2,100 people engaged in talent initiatives

DIVERSITY, EQUITY & INCLUSION

Inform people, policies and practices that strengthen access and opportunity

- Improve minority business growth
- Establish a network of practitioners to increase DEI knowledge within local businesses, and provide them with tools to achieve DEI goals
- Advocate for racial justice

KEY METRIC:
765 people engaged in DEI initiatives

PRIDE-IN-PLACE

Increase engagement in pride-in-place efforts

- Increase the visibility of the Wichita Flag and #ILoveWichita movement
- Execute on the Riverfront Legacy Master Plan

KEY METRIC:
22,575 Wichita Flag followers

ADVOCACY

Expand the Chamber's influence at all levels of government

- Increase member engagement in government activities
- Develop and advocate for pro-business policies at all levels of government
- Support the election of pro-business candidates for public office

KEY METRIC:
50% policy wins

SUSTAINABILITY

Maintain financial integrity and achieve long-term sustainability and business continuity

- Develop a plan to grow new revenue streams and operating reserves
- Develop membership recruitment and retention strategies
- Invest in human resources

KEY METRIC:
$1.6 million operating reserve balance

SoaP Reflections

Overall

- SoaP for an organization with a broad mission
- Attention grabbing design

Pros

- 'Key Metrics' help define goals
- Clear 'Purpose' statement
- Easy left-right / top-down flow

Cons

- Busy on the top-right

SoaP Reflections

Overall

- Strategy on the **Web** format
- Great depth from high-level focus areas to metrics to key initiatives to examples

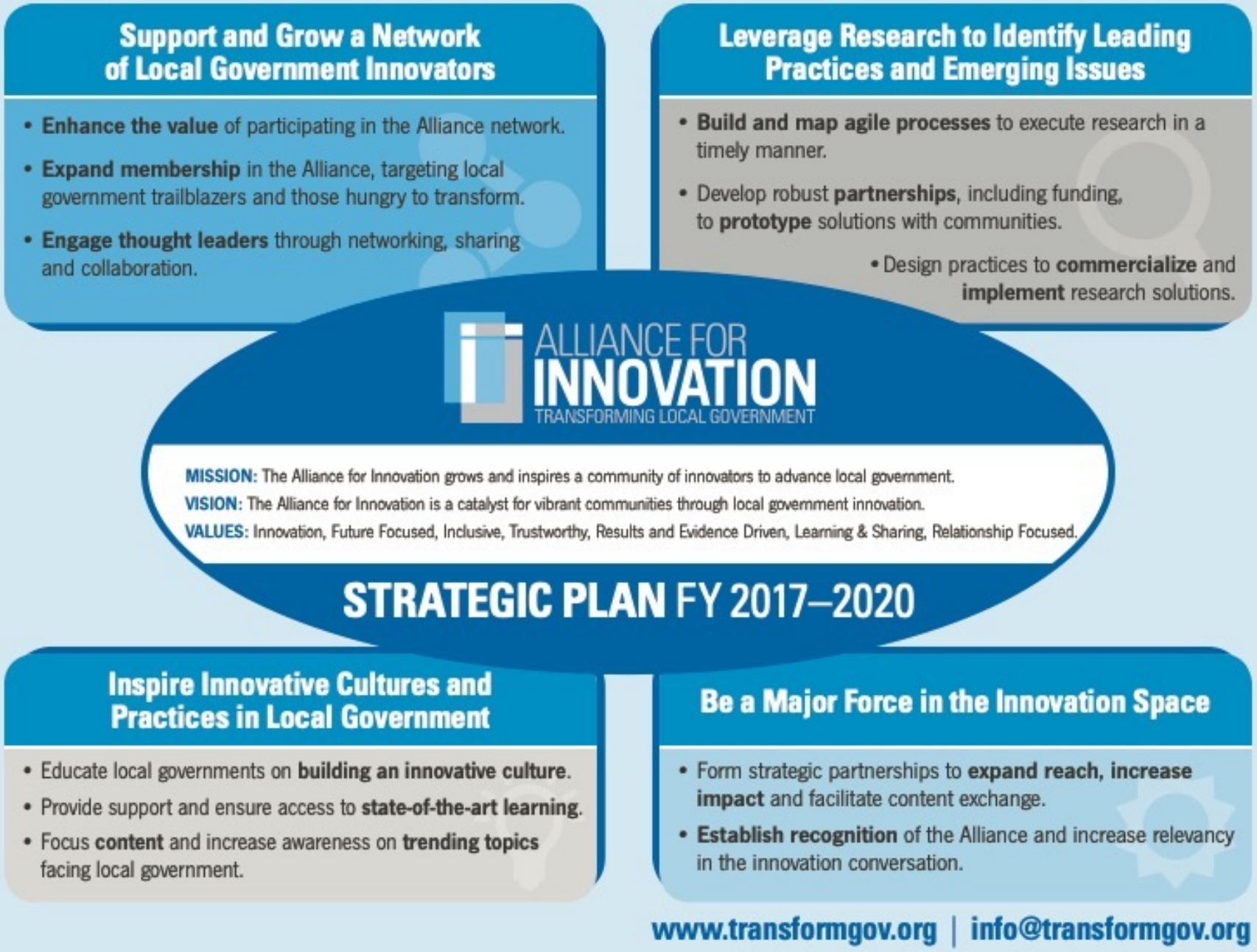
Pros

- Simple focus areas (one or two words)
- Online format provides expanded information
- Outcomes & initiative examples (in expanded level)
- Key metrics (in expanded level)

Cons

- Not on a single page
- Mission & Inspiration are wordy and lack prominence
- Text heavy without graphics or metrics on top page

Drake.edu/continuous-improvement



SoaP Reflections

Overall

- Emphasis on the organization (front and center)

Pros

- 3D effect
- Includes web address

Cons

- Mission, Vision and Values is hard to read
- Many identified Values lessen impact/focus
- Commitment logos are faint and become distracting

Vision

- Become the leading provider of pharmaceutical services in the world

Mission

- We offer the most innovative pharmaceutical services with a quick and reliable solution

Custom size building block

Strategy

- 2010 - 2020: Product leadership
- 2015 - 2020: Operational excellence

Assessment of current situation

- Heterogeneous and complex product offerings
- Lack of insight and anticipa
- Product maintenance is exp
- Non-uniform way of billing customers
- Difficult to comply in time with new and changing regulations due to complex landscape
- Multiple and inconsistent CRM databases

Current selection

Capability heat map

Product management	Customer management	Governance, Risk and Compliance management	Strategic management
Program, project and project portfolio management	Financial management	Asset management	
Supply chain management	Multichannel management	HR management	Sales & marketing management

Graphical format building block

Related concept

Objectives to address assessments

- Improve product offering
- Minimize operation
- Eliminate local vari
- Facilitate resource sharing
- Improve information sharing

One type of concept

Initiatives to realise objectives

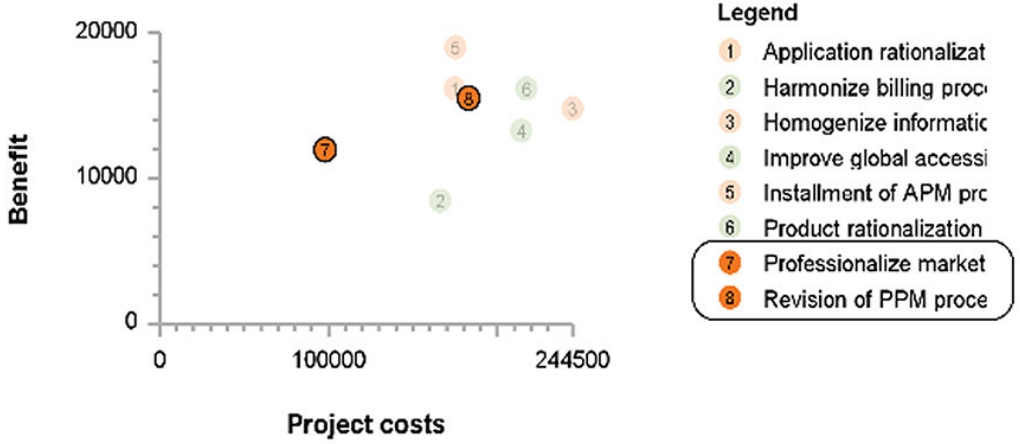
- Professionalise sales & marketing
- Professionalise management
- Consolidate ap
- Harmonise processes
- Centralise information

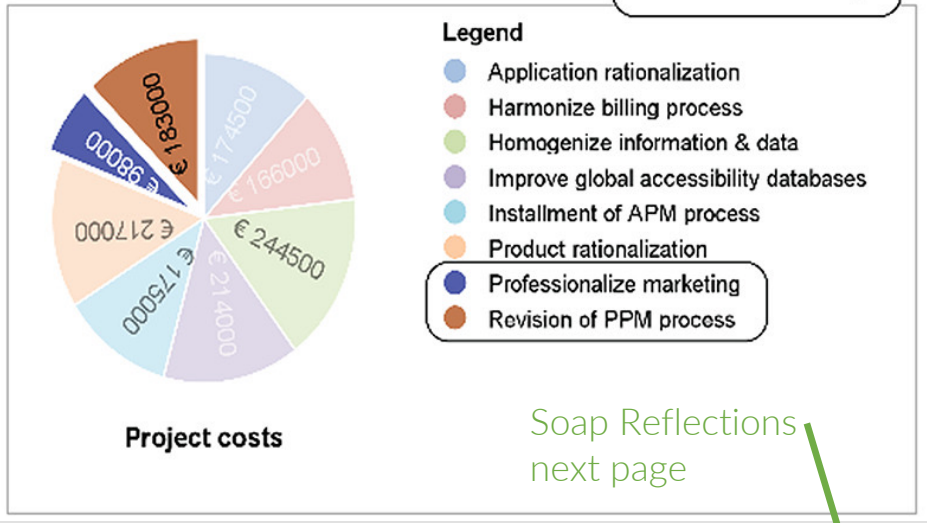
Textual format building block

Business outcomes

- Improved customer experience when administering their insurance
- Reduced ope product main
- Improved way of billing customers
- Increased business agility and adaptability to new regulations
- Improved administration of customer information

Related concept





Soap Reflections next page

From
SoaP example
previous page

Vision

- Become the leading pharmaceutical provider in the world

Goals

- Reduce cost of IS
- Optimise customer-facing processes
- Provide tools that enhance IT functions
- Maximise business unit value creation
- Create a culture of operational excellence
- Acquire, develop and retain employees
- Centralise IT resources
- Deliver homogenised services
- Manage service quality

Assessments

- Poor customer data management
- Many decentralised customer databases
- Unstandardised and incompatible systems
- Low switching costs for customers

Initiatives

- Eliminate local variance
- Facilitate resource sharing
- Improve information sharing

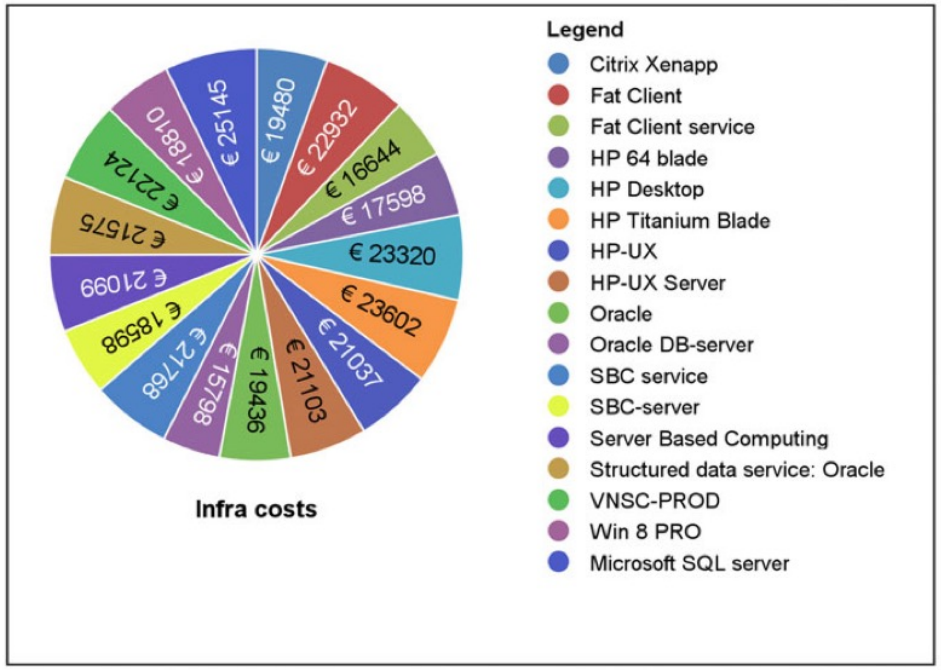
Key capabilities

- Customer billing and collection management
- Financial reporting

Key resources

- Customer-facing applications
- Financial applications

Infrastructure costs



Project costs

Object	Project costs
Analyse billing process variance	€ 23000.00
Analyse heterogeneous data sources	€ 1500.00
Analyse heterogeneous information sources	€ 2500.00
Choose, develop, test and run global financial application	€ 75000.00
Consistent data model development	€ 15000.00
Data cleaning	€ 23000.00
Data mapping	€ 50000.00
Design data architecture	€ 27500.00
Harmonize process variants	€ 47000.00
Information cleaning	€ 25000.00
Information harmonization	€ 50000.00
Information mapping	€ 50000.00
Phase out Amsterdam billing applications	€ 7000.00
Phase out London billing applications	€ 9000.00
Phase out New York billing applications	€ 5000.00

Soap Reflections

Overall

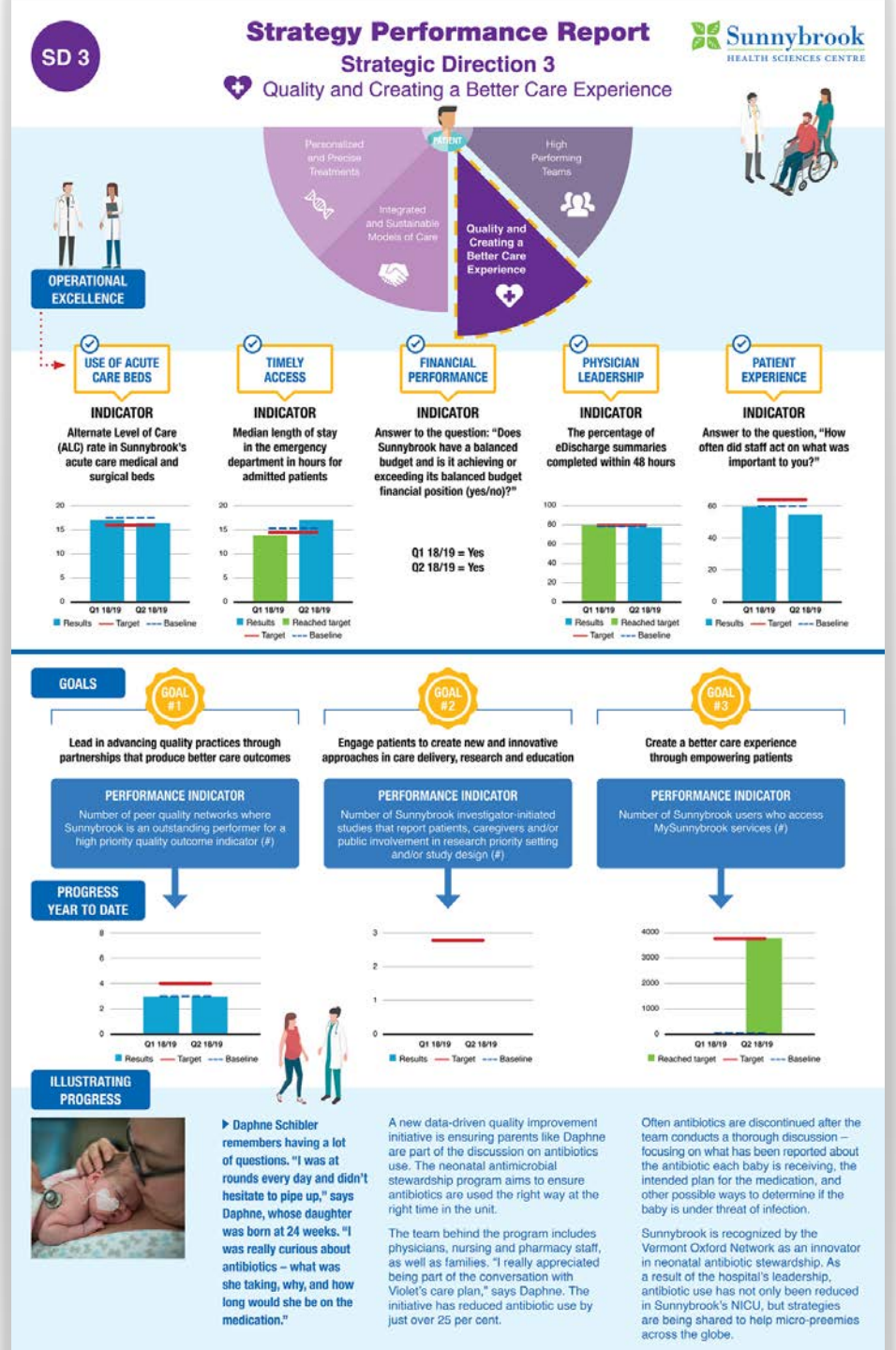
- Internal SoaPs intended for operational decision making that aligns to the strategy
- Great tool to keep focus and maintain perspective

Pros

- Includes situational assessment (a.k.a the “Why”)
- Provides critical data

Cons

- Requires continuous updating
- High information density



Strategy Report Reflections

Overall

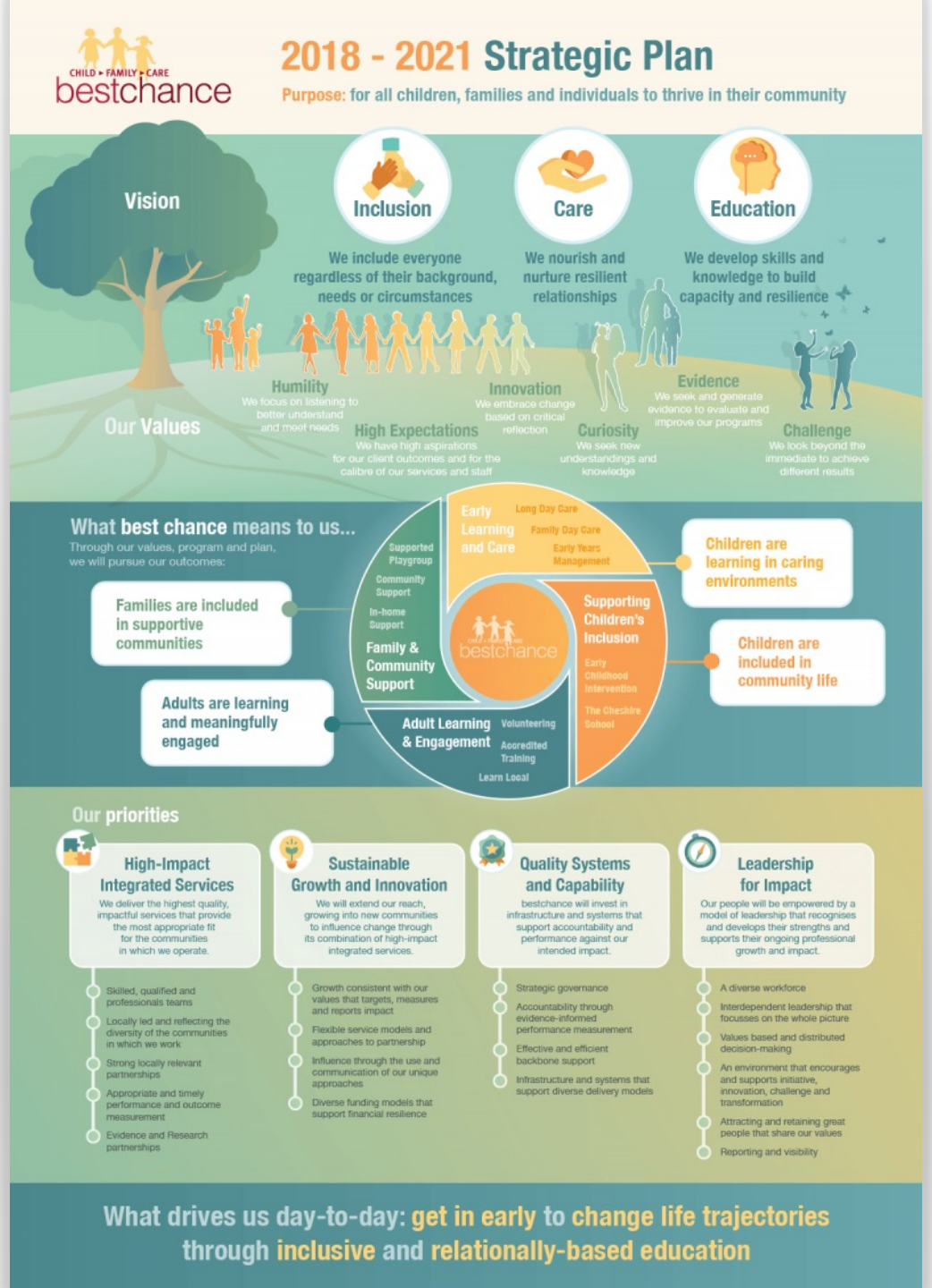
- This is a strategy performance report (#3 of 4 Directions)
- Intended for internal and external stakeholders

Pros

- Highlights one key "Strategic Direction" in depth
- Includes performance, trend and target data
- Photo brings the Mission to life

Cons

- Information intensive and text heavy
- The flow from top to bottom is not clear



SoaP Reflections

Overall

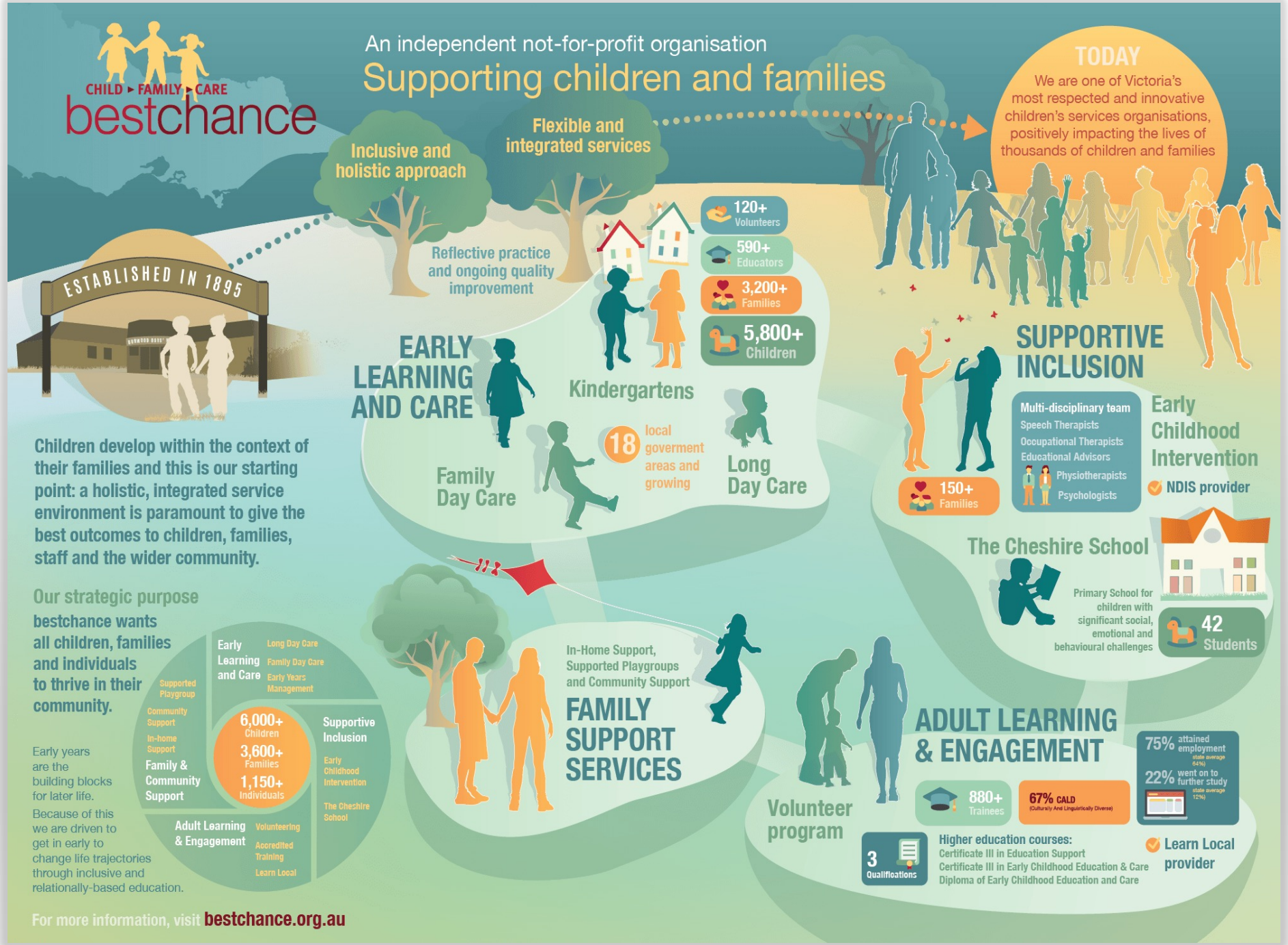
- A SoaP which engages the audience into the Mission
- Good for an external audience including donors

Pros

- Provides the 'Why'
- Tells a story

Cons

- No metrics to define success
- Some text is difficult to read



SoaP Reflections

Overall

- This describes what the organization does and why
- This one-page document is useful to help the audience understand the organization

Pros

- Shows a framework for success
- Includes metrics that add clarity and demonstrate outcomes
- Imagery

Cons

- Not necessary for all organizations

SoaP Reflections

Overall

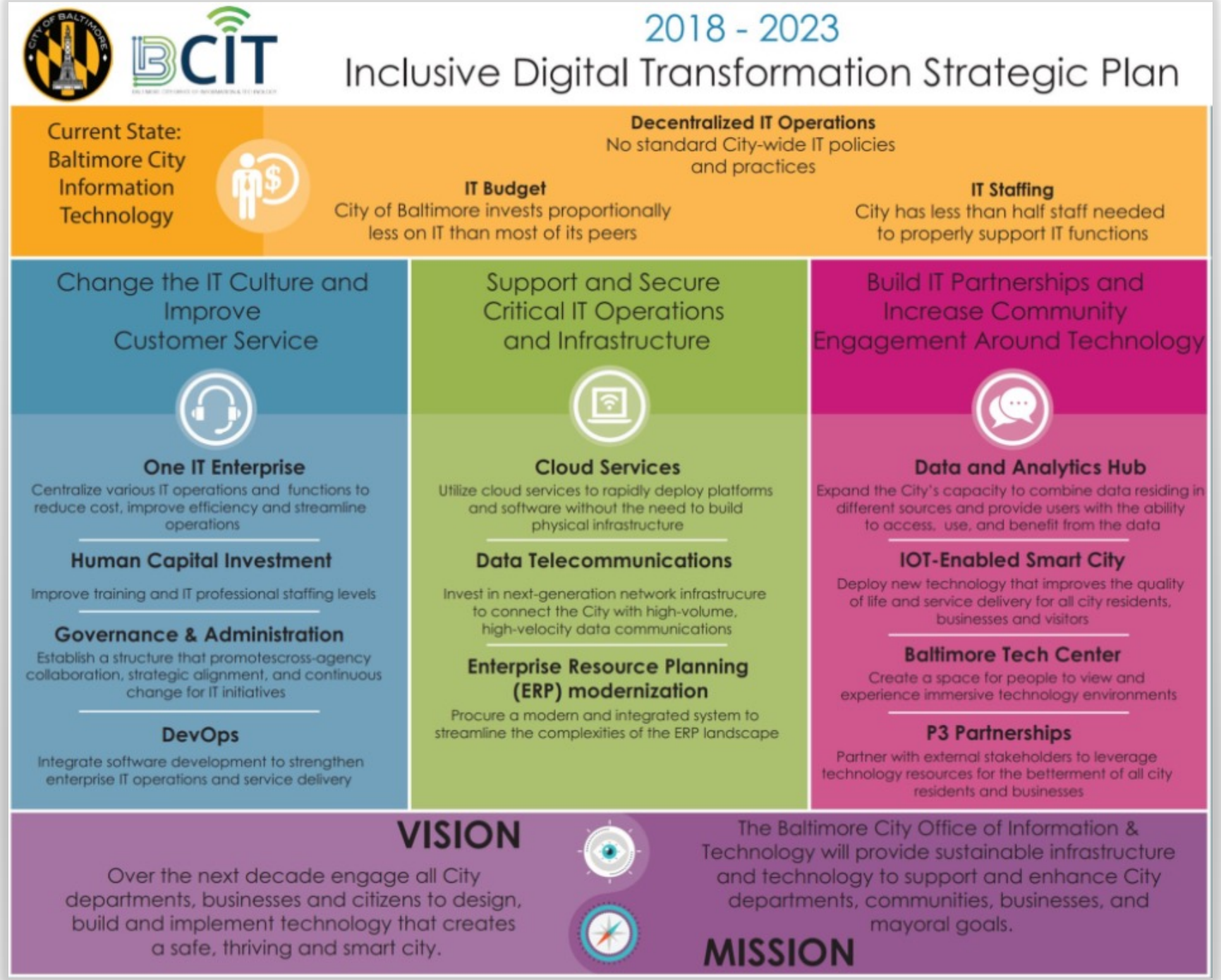
- Detailed SoaP showing how Focus Areas will be addressed

Pros

- Simple top-down design
- Abundant detail (maybe too much)
- Including the motto (bottom) which explains the 'Why'

Cons

- Some outcomes are vague
- Lack of metrics



SoaP Reflections

Overall

- SoaP for an organization having trouble and seeking change

Pros

- Clearly shows poor 'Current State' and provides a compelling vision for a 'Future State'
- Provides a clear business case for change

Cons

- Could potentially be viewed as a list of excuses

AWSP STRATEGIC PLAN

Mission: Support principals and the principalship in the education of all students.

Goal 1: Equity
a. Lead on diversity & equity issues for historically underserved populations.
b. Use an equity lens to best serve all of our members.

Goal 2: Principal Support
a. Work to create longer principal tenures within their buildings.
b. Shape the role and responsibilities of the principal. Make the job as fulfilling and sustainable as possible.

Goal 3: AWSP Health
a. Maintain capacity through key transitions.
b. Increase our own knowledge, abilities, and strategies used as a staff.
c. Prepare for emergencies or unexpected/sudden staff departures.

Advocacy	Professional Learning	Member Support	Diversity & Equity	Student Leadership	Learning Centers	Communications
Utilize member voices to impact policies. Engage members to be active participants in the legislative process. Inform members of current legislative updates.	Provide inclusive professional development offerings that reach our entire membership. Utilize technology to deliver professional development. Support new and future principals. Collaborate with education partners.	Support the use of the AWSP Leadership Framework. Provide legal and professional support. Provide coaching and mentoring services. Facilitate connection of members to each other.	Provide professional learning opportunities. Research and share best practices. Collaborate with other organizations and individuals. Encourage involvement of under-represented members. Work to diversify the school work force.	Train and empower students to lead. Support adults engaged in student success. Provide resources for engagement and empowerment. Promote the value of student leadership.	Provide unique and affordable facilities for learning. Offer courses and curricular resources for STEM and other education programs. Utilize staff expertise to support programs.	Ensure members are informed. Learn the needs of our members. Build relationships with members and stakeholders. Promote AWSP as one of the state's leading education organizations.
Example: The Legislative Committee is a vehicle to utilize member voices to impact legislation. See more initiatives on page xx.	*Example:* Established the Launching Principal Leadership series for new and newly assigned principals and APs. See more initiatives on page xx.	*Example:* Provide legal and professional advice with Professional Rights and Responsibilities counseling. See more initiatives on page xx.	*Example:* Created the annual Equity Conference with partner organizations. See more initiatives on page xx.	*Example:* Offer Summer Camps for training and empowering student leaders. See more initiatives on page xx.	*Example:* Design ropes course challenges for team building. See more initiatives on page xx.	*Example:* Inform members via our website, social media, newsletters, video updates, and podcasts. See more initiatives on page xx.

AWSP
ASSOCIATION OF WASHINGTON SCHOOL PRINCIPALS

SoaP Reflections

Overall
- A SoaP for an association
- Great graphical representation of strategy elements

Pros
- Logical layout
- Examples for clarity
- Mission is first

Cons
- Non-standard strategy terminology
- No metrics to define success
- Not complete (see page xx along the bottom).

OUR UPSTATE (TIER 2) STRATEGIC PLAN OVERVIEW: STUDENT AFFAIRS

Tier 2
v.08.20.2018

STUDENT AFFAIRS MISSION	Assisting students to achieve their goals and potential.
STUDENT AFFAIRS MOTTO	Making it happen.
STUDENT AFFAIRS VALUES	• Student success • Partnerships • Innovation • Meeting students "where they are" • Employee potential • Service

UPSTATE STRATEGIES AND RESULTS			
INTEGRATION Upstate will be one university, connected by mission and aligned leadership, integrated through a culture of inclusion, transparency and trust.	**INNOVATIVE LEARNING AND DISCOVERY** Upstate will be the destination of choice for patients and innovative employees, educators, learners and researchers.	**COMMUNITY IMPACT** Upstate will be a collaborative and trusted partner in service to our communities.	**EXECUTION AND GROWTH** Upstate will be an excellent university growing through aligned decision making, efficient, effective operations, quality services, and a dedicated and diverse workforce.

★ Indicates the UMU institutional Objectives this Strategic Plan will focus on impacting

PERSPECTIVE	STRATEGIC OBJECTIVES AND STRATEGY MAP	STUDENT AFFAIRS PERFORMANCE MEASURES	STUDENT AFFAIRS INITIATIVES
LEARNERS, PATIENTS, COMMUNITY & OTHER STAKEHOLDERS	★ Increase Reputation for Excellence; Improve Health Outcomes; ★ Reduce Health Disparities; ★ Increase Access	• Number of applicants and matriculants from URM backgrounds • Number of applicants and matriculants from rural communities • Completion of mobile-friendly websites • Production of reinvigorated recruitment materials • Number of applicants and matriculants via new admissions pathway programs	• Explore cultural humility training for students • Website: Colleges/academic-focused website and mobile-friendly website • Partner with alumni for mentoring, recruitment, etc. • Improve social media presence
FINANCIAL STEWARDSHIP	★ Improve Fiscal Responsibility & Transparency; Improve Financial Performance	• Number of financial literacy programs offered • Student satisfaction with financial literacy education • Data driven budget requests and staff actions	• Financial literacy workshops and resources for students
INTERNAL PROCESSES	Improve Efficiency & Accountability; Grow Programs & Community Partnerships; ★ Improve Quality; Enhance Innovation; ★ Increase Integration	• Execution of One University Commencement • Number of community-building programs offered across colleges	• Increase interactions with all Deans/Colleges and better communicate student affairs Efforts Campus-Wide • Better use data for planning and assessment • One University Commencement • Explore single academic calendar and all inclusive orientation
ORGANIZATIONAL CAPABILITIES (PEOPLE, FACILITIES, TECHNOLOGY)	★ Increase Diversity, Equity, Access, & Inclusion; ★ Improve Culture of Trust; ★ Increase Workforce Satisfaction; ★ Optimize Technology, Facilities & Support Services	• Actions taken in response to climate surveys • Offerings and evaluations of staff development initiatives • Offerings and evaluations of programs re: Cultural Humility and Climate	• Assess climate for students from marginalized identity groups • Explore campus-wide learning communities • Increase professional development for staff & students

SoaP & Strategy Map Combo Reflections

Overall

- Detailed departmental strategic plan that aligns to an over-arching plan
- Primarily for an internal audience
- The strategy map shows the strategic dependencies

Pros

- Shows interconnectedness
- Shows connections to higher level (Tier 1 UMU) objectives
- Includes measures and initiatives

Cons

- Many elements (Mission, Motto, Values, Strategies, Perspectives, Objectives, Measures, Initiatives)
- No KPIs or quantifiable targets

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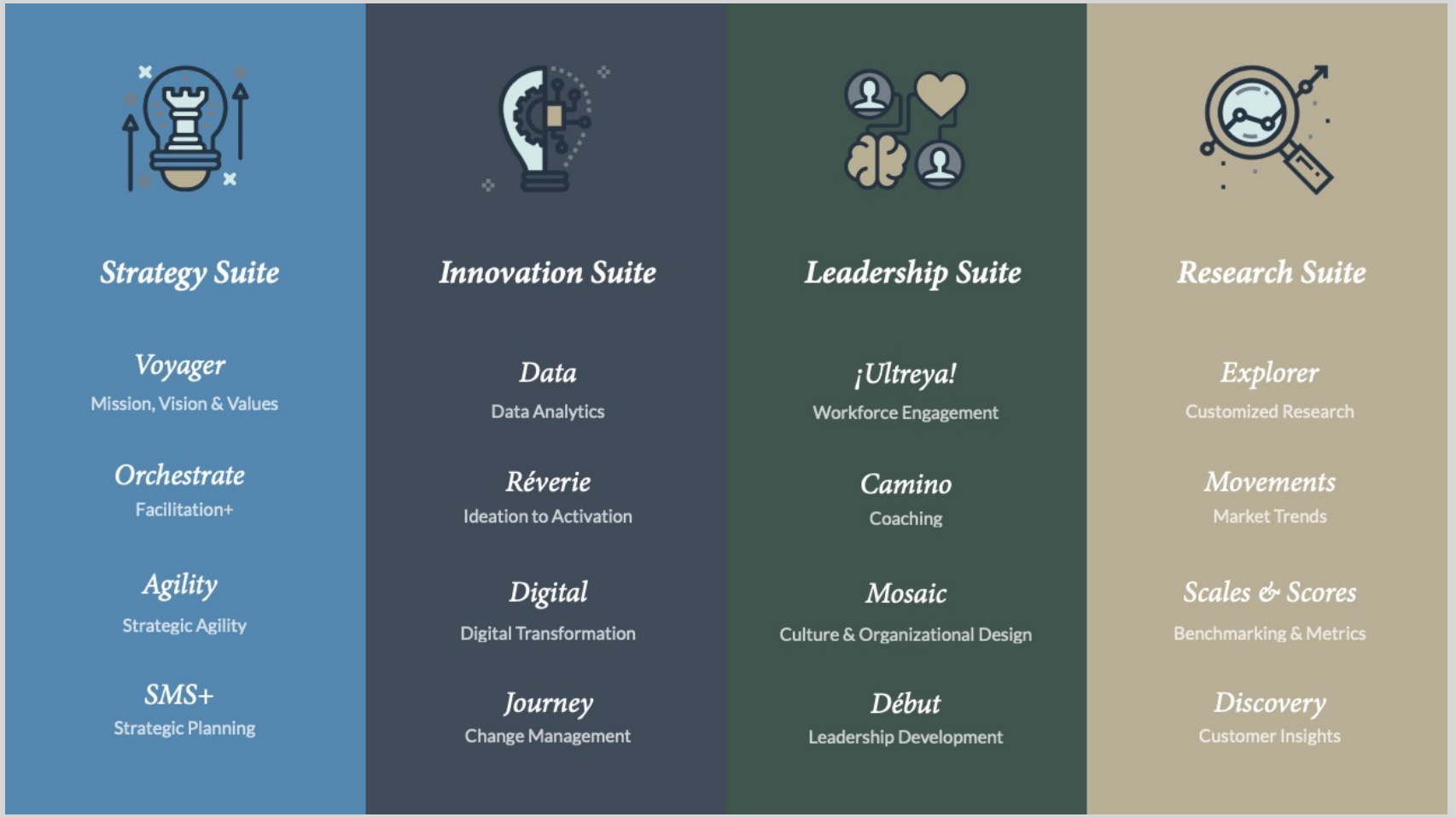
The world is changing, are you?

Bâton Global is driven by a desire to bring together the best of academic research with cutting-edge technologies and leading global business experience.

Our mission is to provide strategy, innovation, leadership and research services for solving our clients' most complex challenges, transforming organizations and communities worldwide.



Learn more and schedule a free consultation at: www.BatonGlobal.com

ADDITIONAL STRATEGY RESOURCES

- How To Write Mission, Vision, and Values Statements - 100 Examples
- Developing Strategic Objectives and Focus Areas
- Introduction to PESTLE Analysis: Why a Systemic Approach is Best
- Free Strategic Planning Template

Let's discuss where you're at and where you want to go.

Schedule a free consultation
www.batonglobal.com

Contact us anytime
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