• #1 for success is communication
• Get language agreed upon early – various meanings of priorities, goals, objectives, strategies, tactics, etc. can be confusing
• Try to balance capturing meaning with relatability & simplicity of language... too much MBA speak will shut people down
• Do not have too many goals at once – it waters down (no pun intended) the ability to make progress with too much on the plate, and it is confusing.
  o About 15 initiatives a year
• Staff views the plan/dashboards as a glorified way to track things (importance of keeping day-to-day items out of a strategic plan)
• Power’s first plan unsuccessfully used the equivalent of Division Implementation Plans. Their second plan uses a Department Implementation Plan.
• No one is going to read a big book. TPU uses a place mat type format (and literally used them as table place mats).
• Prepare the organization to accept the growing nature of the plan (it will not be perfect and it will develop over time)
• Control the scope: have smaller bite size milestones where progress can be managed and clear
• Make it “fun” to celebrate the wins (Water plays Pomp & Circumstance)
• Water would prefer not to use red, yellow, green since people try to avoid red or see it as a bad thing rather than an opportunity to talk and focus attention
• Power likes relatability of red, yellow, green, but still it is work to show that red is not punitive
• EDPRs/annual individual goals are not strongly connected to the strategic plan objectives
• Hired a strategy manager – can it put too much responsibility on one person rather than sharing ownership?
• They find it helpful to annually work on a focus to, longer term, get to the new place
• (can’t remember which one) has monthly senior leadership meetings on the strategic plan and quarterly larger meetings which include their direct reports and key players