

Identifying connections between goals and strategies

INTRODUCTION

A trajectory is a series of interim targets that plot the planned path of a goal metric between now and the target date. To estimate trajectories, we encourage participants to consider the impact of each of their strategies on the goal. In order to do so, it is important to first identify which strategies connect to which goals.

In this exercise, participants will identify which strategies are expected to impact each goal.

The exercise should ideally be completed by a small group (5-10 people), likely the system's leadership team, including any goal leaders, with the input of the Delivery Unit.

Note that **if your system already created a delivery plan architecture at the beginning of the delivery planning process, you can skip to the last part of this exercise**, using the existing architecture as the basis for the conversation.

OBJECTIVES

- Reaffirm system goals and strategies
- Connect systems strategies to the goals they will impact

MATERIALS NEEDED

- Markers
- You will need a large blank space on the wall, upon which you can post and write. You can do this by using a dry erase board, flip chart paper, or EDI's signature "brown paper." However you create this, it needs to be visible to the entire group and easy to change and add to.
- You'll also need to use small, repositionable cards. These cards can be just small pieces of paper, index cards or Post-Its, and there are a number of ways to make sure they are repositionable. If on a dry erase board, you could use magnets to hold cards in place, and on other surfaces, you could use sticky tack or spray-on adhesive – whatever won't damage your wall. For this exercise, cards should be of 2 different colors.

TIME

- Exercise: 45 minutes

**INSTRUCTIONS**

Time	Activity	Facilitator notes	Materials
5 minutes	Ensure all existing goals and strategies are recorded on cards (goals on one color, strategies on the other) and posted on the wall; reflect on the goals and strategies and make sure they are represented	<ul style="list-style-type: none"> ■ If possible, record the goals and strategies on cards ahead of time so you are ready to begin the conversation right away ■ Do a quick check up front to see if anything is missing, but you will be able to add additional goals and strategies later in the conversation 	<ul style="list-style-type: none"> ■ Wall space ■ Cards of two colors ■ Markers
25 minutes	<ul style="list-style-type: none"> ■ Move the cards around on the wall so that the strategies are arranged underneath the goals they are most expected to impact ■ If a strategy will have a major impact on two goals, draw a line to both to indicate this 	<ul style="list-style-type: none"> ■ This will be one of the more challenging parts of the exercise for the facilitator, as it will involve some trial and error, as you propose different matches and participants discuss with one another what is appropriate ■ Ask which strategies align to which goals or if any strategies can be grouped together and begin to move them around to represent that 	<ul style="list-style-type: none"> ■ Wall space ■ Cards ■ Markers
15 minutes	Reflect on visual architecture of the connections of goals and strategies and makes sure they are accurate	<ul style="list-style-type: none"> ■ Ask participants to reflect on the architecture and visual connections and discuss the following: <ul style="list-style-type: none"> – Do these connections represent the impacts and goal connections we planned for in our 2x2 and strategy profiles? – Are there any major strategies missing? – Why do we think each of these strategies will impact these goals? – Do we think any will impact multiple goals? ■ Make any changes based on the conversation 	<ul style="list-style-type: none"> ■ Wall space ■ Cards ■ Markers