

The Business Plan Blueprint: Integration and Impact

By Shelli Bischoff

This article highlights what it means to be an integrated organization and introduces the business plan blueprint as the tool to guide the transition from fragmentation to integration.

The Integration Imperative

Introduction

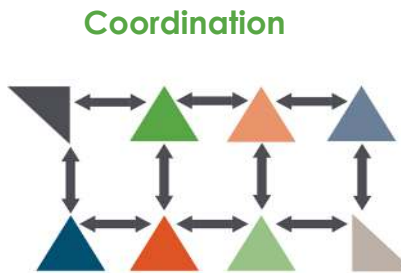
Habitats that once stretched across huge swaths of land are now crisscrossed by urban and suburban development and roadways that divide the landscape. This landscape fragmentation degrades wildlife habitat, decreases ecological functions, and detracts from scenic beauty. Many of our conservation clients have found that the best way to counteract the negative impacts of fragmentation is to engage in landscape-scale conservation efforts.

Those who work in public health and the aging network wrestle with similarly fragmented systems that send their clients and communities off in multiple directions in hopes of cobbling together an effective prevention effort or a suitable package of support services. These sectors focus on systems change and implementing integrated models of care as their best strategies to combat the negative impacts of fragmented healthcare, prevention, and long term services and support systems.

In both instances, the answer to fragmentation is integration. Indeed, intact and interconnected environmental, ecological, social, and economic systems are critical to maintaining healthy populations (human, plant, and animal) and thriving communities.



Organizational systems also experience fragmentation.... The answer for this sort of fragmentation of energy, resources, and results is integration.



Each part maintains its own, separate identity while sharing information and working together.



A collective whole that is greater than the sum of its parts; how parts work together, shift and parts that do not align are removed.

The Fragmented Organization

Organizational systems also experience fragmentation. Such fragmentation manifests as various forms of isolation: programs or projects that operate in their own separate siloes; staff in different departments who rarely interact; or shelves full of different kinds of plans—strategic, outreach, communications, fundraising, etc.—that are at best uncoordinated and at worst, totally unrelated.

The negative consequences of organizational fragmentation are also numerous. A fragmented organization spends resources inefficiently. It struggles to build a base of support and to communicate a strong, unified message. Staff may experience low morale, as board members, volunteers, and partners struggle to remain engaged.

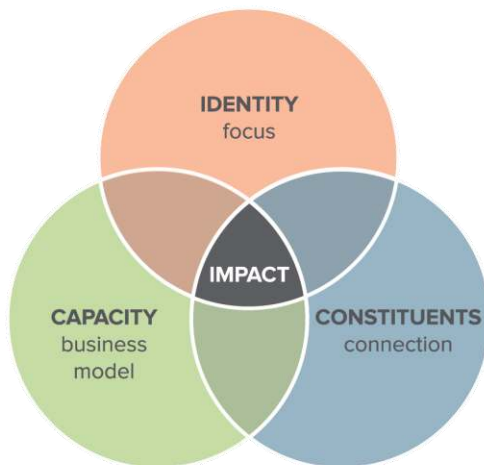
Most importantly, the more fragmented the organization, the less impact it has towards its mission.

Integrating for Impact

Integration doesn't ask how an organization's programs, staff, partners, systems, and resources *coordinate* with one another. Rather, integration *incorporates, enmeshes, and interconnects* all the various parts of the organizational system into a cohesive, synergistic whole. A whole that is much more than the sum of its parts.

An integrated organization leverages and optimizes all of its resources. And, just as in the cases of landscape-scale conservation or integrated models of health care, taking an integrated approach is how mission-driven organizations can best maximize impact.

The Integrated Strategy for Success and Sustainability



Integrated Strategy for Success and Sustainability
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When organizations are integrated and aligned, they are more likely to achieve impact. It is impact that ensures success and sustainability.

Overview

The Framework: the Integrated Strategy

For the past 20 years, we have used the *Integrated Strategy for Success and Sustainability* in our planning and organizational development work with more than 700 nonprofit organizations and government agencies. It illustrates an integrated organization, one where the critical components of success—identity, constituents, and capacity—are in alignment.

Identity defines an organization’s strategic focus—what is to be achieved. Constituents include its audience, competition, and marketplace gaps. And capacity defines the structure, infrastructure, and revenue model to support the organization’s mission-related work.

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The Tool: the Business Plan Blueprint

The business plan blueprint is the tool for organizations to define themselves in an integrated manner. While most mission-driven organizations and agencies are familiar with strategic plans, a business plan blueprint is a more sophisticated, comprehensive plan.

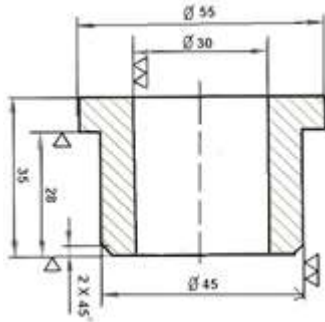
Like a strategic plan, the business plan blueprint documents an organization’s strategic direction and focus. But the business plan goes further and more fully considers the organization’s constituents, external environment, and competition. Most significantly, it addresses the organization’s capacity—systems, structure, staffing, governance, processes, and financial resources—necessary to achieve goals and serve constituents.

In this way, the business plan blueprint defines the organization holistically, as a unified, integrated system. It clarifies how

Literally a Blueprint

The business plan blueprint for an organization is analogous to a blueprint for a building:

- ▲ *It describes the organization's site, style, and shape*
- ▲ *It defines the room for and constraints on growth*
- ▲ *It outlines what you are building and ensures all the parts connect or flow*



- ▲ *And like an architectural blueprint—it does not tell you what color to paint on the walls or where you hang the pictures*

different aspects of the organization (program, projects, outreach, fundraising, etc.) relate to one another. This understanding of the organization as an integrated whole ensures that all of the organization's strategies, decisions, actions, and resources are optimized for potency and impact.

While the business plan blueprint may be a new concept among nonprofits and government agencies, there's nothing new about business planning. It has been the cornerstone of MBA programs and small business initiatives for decades. We have taken this best practice from the private sector and simplified, streamlined, and customized it to meet the needs of the nonprofit and public sectors.

The Process: Business Planning

Because mission-driven organizations have important work to do, we have adapted the business planning process to be focused, expedient, and yes—painless. The business planning process includes four phases (research and analysis; decision making; blueprinting; implementation) and the first three phases can be completed in 1-3 months for most mid-sized organizations. The implementation phase takes place over time and varies depending upon the organization's readiness and ability to adapt to change.

Phase 1: Research and Analysis

The first phase of the business planning process is one of research and analysis. As with any organizational development process, business planning relies upon a rigorous and objective analysis. The analysis defines the fundamental issues facing an organization and is necessary for solid strategic decision making. Analysis includes a critical examination of relevant information, such as:

- ▲ Industry or subsector trends and issues and forecasted conditions, including funding trends

Business Planning Process

Phase 1: Research and Analysis

Phase 2: Decision Making

Phase 3: Business Plan Blueprint

Phase 4: Implementation

- ▲ Demographic projections and psychographics (values, attitudes, preferences, and lifestyles) of potential target markets
- ▲ Competition (others doing similar work or operating in the same niche)
- ▲ Current and projected staffing or volunteer capacity, structures, processes, and systems
- ▲ Opportunities for and obstacles to growth and success
- ▲ Current revenues and expenses, financial forecasts, business model, and sustainability

Phase 2: Decision Making

The second phase, decision making, requires the organization's staff and volunteer leadership to make deliberate, strategic business decisions based on the analysis. The exact decisions that need to be made vary, depending upon the issues that emerged in the analysis. Some examples of strategic decisions include:

- ▲ How to refocus core programs and services given trends, funding, or competition
- ▲ Whether to focus on connecting more deeply with existing target markets or expanding into new ones
- ▲ What kind of growth in human or financial resources will be needed to achieve desired results
- ▲ How to develop or redesign facilities or other aspects of organizational capacity to align with identity and constituents
- ▲ Whether a philanthropy or fee-for-service revenue model is the best fit moving forward

Phase 3: Business Plan Blueprint

Both the analysis and decisions inform phase three—the blueprint. The analysis defines where an organization is, and the decisions define where it is going. At this point, there are right answers to how the organization aligns to form a more integrated whole.

The resulting business plan blueprint is a written document that tells the story of why an organization exists, how it achieves its results, and why it deserves attention and support.

For example, an organization with *abc* mission must have programs, products, and services that deliver *abc*-related results. Those offerings must be relevant to, and resonate with, its target market. Its outreach strategies must be the ones that best reach and connect with those markets. Continuing on, staff must have the right skills, carry out the right functions, and have the financial resources necessary to deliver those offerings to those target markets. If the organizational system has any disconnects or misalignments, then resources will be wasted and results diminished.

This is integration in action. The answer to organizational fragmentation is not moving the pieces around. It is creating something unified and fundamentally changed.

During the blueprint phase, exactly how all the various components of its identity, constituents, and capacity work together as an integrated whole are mapped out. This part of the process forces the organization to think through and spell out how everything fits together to achieve impact. The resulting business plan blueprint is a written document that tells the story of why an organization exists, how it achieves its results, and why it deserves attention and support.

Phase 4: Implementation

Once the blueprint is complete, leadership focuses on phase four—implementation. Using the blueprint as their guide, the focus is on organizational development—the process of aligning resources to achieve goals and meet constituent needs in an efficient and effective manner.

Requisite organizational development tasks are usually sequential. For example, you can't really restructure the organization chart until you have redefined position descriptions and understand staff assets and gaps. You can't really redefine positions until you have built out the new or

A good business blueprint can be used to attract investment to facilitate implementation.

refreshed programs. Further, sometimes refreshing programs or services requires more in-depth understanding of target markets.

Unless facing a crisis, implementation usually takes place over time. Nonprofits and public agencies rarely have the luxury or resources to bring in needed talent, technologies, or systems all at once. Further, it takes time to transition out of some programs or to retrain staff. An action plan that outlines specific tasks, deliverables, and dates keeps implementation on track while also breaking the work down into realistic, bite-sized chunks.

The pace of change depends on an organization's leadership and culture. For example, deep cultures generally have strong identity and brand, but can also be entrenched in the past and slower to change. Or a more fiscally conservative board might be proud of their financial stability, but more cautious about new ventures or a different business model.

A good business blueprint can be used to attract investment that facilitates implementation. Both long-time supporters and more entrepreneurial investors often appreciate how the blueprint articulates a deliberate approach to building the organization and maximizing impact. Many will understand that it takes time and money to reinvent, and may be willing to provide organizational development or transition funding to support implementation.

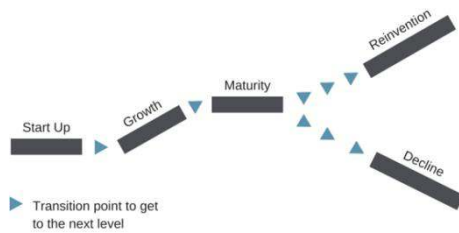
The Business Plan Blueprint

The next page is an outline for a typical business plan blueprint. Each section of the blueprint answers core questions, based on the analysis and decisions. A business plan blueprint can take whatever format is most useful—a table, a bulleted outline, or a full narrative.

Outline	Core Questions Answered
I. Introduction A. Purpose B. Process C. Overview and preface	How do we intend to use this plan (purpose)? Who is the intended audience? What methodology informs the plan? What are the plan's highlights?
II. Analysis A. Internal analysis B. External analysis	What trends, issues, conditions, or forecasts in our external environment are likely to influence our ability to be successful? What is our current organizational situation or capacity? What are our challenges or strategic opportunities for next-level development, success, and sustainability? What must we pay attention to as we set our direction and position for success?
III. Organization Description A. Vision, mission, goals B. Distinctive competence C. Strategic issues and focus	What is our organization's purpose? (mission) What difference do we make? (impact) What do we stand for? (brand) What are our core principles? (values) What are we trying to achieve? (goals)
IV. Markets A. Market analysis B. Market segments C. Target market profiles D. Competition	What is the size of our largest potential market? Who are our target markets and why? What are the primary characteristics of our target market relative to our cause? What action do we want the target market to take? What is our competitive environment? What distinguishes us from our competitors?
V. Products, Services, and Programs A. Core products, services, or programs B. Supporting products, services, or programs C. Value proposition	What do we do to achieve goals towards mission? What are our products and services? What value do our products, services, and programs provide to our target market?
VI. Outreach Strategies A. Marketing, communication, and public relations B. Direct contact, promotion, media (earned, paid, social), advertising	What are our primary strategies to connect and engage with the target market? What is our consistent and foundational message? What do we do to build and maintain a positive image with stakeholders and throughout our service area?
VII. Strategic Partnerships A. Necessary partners B. Partner relationship strategies	What skills, resources or leverage do we need in order to achieve goals? What strategic partners must we maintain relationships with in order to be successful? What are our primary strategies to engage with strategic partners?
VIII. Organizational Development A. Leadership and governance B. Management and staffing C. Structure, systems, and processes	What are the core functions to be carried out? Who is responsible for leadership and for management? What is the composition, skill, and role of the board? What are our core systems that support efficient processes? (i.e., data management or project management) How do we engage or mobilize interns, volunteers, or partners? (if applicable)
IX. Finances A. Revenue model B. Projected income and expenses	How much does it cost to run the organization? What are our primary sources of funds? What are our strategies to generate resources? What are our income projections?

For the Business Plan Blueprint Workbook call 303-223-4886 or email shelli@conservationimpact.com

Organizational Transitions



Developing a business plan blueprint is appropriate whenever an organization needs to deliberately set a direction for the future, maximize its impact, or ensure its sustainability.

Conclusion

When to Create a Blueprint

Developing a business plan blueprint is appropriate whenever an organization needs to deliberately set a direction for the future, maximize its impact, or ensure its sustainability. Frequently these needs arise as an organization transitions between stages of its development.

For example, business planning is particularly useful to organizations as they are starting up, prior to or following a growth phase, and following years of maturity when it is time to reinvent in order to meet new needs, position relative to the competition, or “go to scale.” In addition, a business plan blueprint can help an organization that has evolved organically to be more deliberate in integrating its identity, constituents, and capacity.

We are fortunate to have worked with organizations and agencies to develop business plan blueprints in all of these circumstances. We have created blueprints to guide nonprofit startups, and to help long-standing organizations add new initiatives, or to fully reinvent how they meet their mission and organize for success. Regardless of the situation, the business planning process and resulting business plan blueprint consistently offer a deliberate, thoughtful approach to navigating change; reassuring and re-engaging staff, volunteers, supporters, and partners; and re-energizing the organization.

Summary

This article began by exploring the negative consequences that arise from fragmented systems. Whether a fragmented landscape that degrades the habitat of an endangered species, a fragmented support system that is difficult for someone in need to navigate, or a fragmented organization that makes little impact towards its mission, the answer is integration.

Mission-driven organizations that care about making an impact must integrate all aspects of their organization into a cohesive,

synergistic whole that optimizes resources and maximizes results. The business plan blueprint is *the* tool for organizations to become more integrated, successful, and sustainable.

About the Company

Conservation Impact and Nonprofit Impact are client-centered practices of our mission-driven, B Corp certified company. We work to radically impact how organizations achieve results towards mission and achieve impact.

Founded in 1996, we provide comprehensive planning, marketing, and organizational development consulting and training solely to nonprofits, government agencies, and foundations. Our practices focus on the conservation, environmental, food systems, healthy living, and healthy aging sectors.

Together, Conservation Impact and Nonprofit Impact have successfully completed more than 1,010 projects with 675 clients in 46 states and 5 countries.

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Shelli Bischoff is the founder and president of Conservation Impact and Nonprofit Impact and has 30 years of experience in nonprofit planning, marketing, and organizational development. Shelli developed the Integrated Strategy as a framework for creating more impactful and sustainable organizations. Shelli is a

sought after speaker and trainer known for her content expertise and her dynamic and truth-telling style.

Shelli is currently adjunct faculty at the Colorado School of Public Health, previously served as adjunct faculty in the Regis University Master of Nonprofit Management program, and has been visiting professor on nonprofit management and marketing at College of the Atlantic. She has held several nonprofit management positions, created successful revenue-generating nonprofit ventures, and has served on numerous nonprofit boards. She holds a Master's of Public Administration from University of Colorado



Your impact is our mission.