

# STRATEGIC PLANNING 2022-2023

May 23, 2022  
8:00 – 9:00 AM



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## How We Will Do it Today and Tomorrow and The Next

THE CASCADE OF STRATEGIC CHOICES:



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## Yesterday Compared to Today



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## Successful Strategic Planning

The way we always did it

- Strengths
- Weaknesses
- Opportunities
- Threats

The ways we will try going forward

- Strengths
- Weaknesses
- Opportunities
- Threats

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## Mission Statement = “Why?”



To make your statement work, you must involve all stakeholders in developing the mission statement – all other goals will flow from this.



Without this involvement, you will not have buy-in on your strategic plan and will have difficulty in implementation.



This means, all board members, committee chairs, and your Executive Director if you have one.

[OnStrategy Video](#)



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## Mission Statement

- **Was:**
  - DAHU will support the efforts of each member to best serve the needs of our clients and industry by providing continuing education & professional development, access to innovative industry tools & solutions, legislative & regulatory updates, advocacy & credibility, and social networking & public service.
- **Proposed and Adopted:**
- **The mission of DAHU is to serve the needs of our clients and industry by providing professional development, networking, and access to innovative industry tools.**



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## Our Vision Statement

To be the resource for insurance professionals through continuing education, mentoring, and networking opportunities.

- How are we going to get there?
- What will that look like?
- Creating glue/stickiness/Velcro
- “Hey, are you part of DAHU?”



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## Getting our Vision in Focus

Be FUN and NICE! If we are attractive, they will come and stay.

- Mentoring – new to the industry, hoping to connect
  - Finding direction
- Encouraging others to engage with others in the industry, sharing ideas, collaborating, without fear of “losing” business
- Compliance tools – webinars, podcasts, reminders
- Business growth – Running Your Business
- Awareness of all resources NAHU offers
  - Website Review – DAHU and NAHU during membership meetings
  - Newsletter spotlights
  - Did you know? Corner

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## Our Resources

- ❖ People
- ❖ Sponsorships
- ❖ Creativity
- ❖ Other trade industries
- ❖ Community
- ❖ New members
- ❖ Old members
- ❖ Prospective members



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## Threats

- ❖ Our governance & Bylaws
- ❖ Short-sightedness
- ❖ Lack of continuity
- ❖ Lack of mentorship
- ❖ Lack of training
- ❖ Lack of successful succession planning
- ❖ Unwillingness to move people through the offices



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## Ongoing Strategic Assessments

- ❖ Review, revise, and reshape the governing structure and documents
- ❖ Follow the governing documents keeping the health of DAHU at the forefront
- ❖ Apply for Chapter Certification as a baseline
- ❖ Use the Pacesetters as an outline for success



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## Developing Goals

- ❖ Goals must be SMART to be effective
- ❖ A SMART goal is:
  - **S**pecific
  - **M**easurable
  - **A**chievable and **A**ssignable
  - **R**elevant to the Mission and **R**ealistic
  - Has a **T**ime frame for achievement



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