

The Importance of Metrics in Strategic Planning

What Gets Measured, Gets Done



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In the fast-paced and increasingly complex world of organizational management, a strategic plan without well-defined metrics is like a ship without a compass—it may be moving forward but with no clear direction. The saying “what gets measured, gets done” holds particular significance when developing or refining metrics in a strategic planning context.

Metrics play a crucial role in evaluating an organization’s effectiveness and ensuring that its efforts are aligned with long-term goals.



Developing or Refining Metrics

For metrics to drive organizational success, they must be measurable and directly aligned with strategic goals. Effective metrics provide a clear view of progress and offer objective insights into how well an organization is meeting its targets.



Whether the aim is to increase community engagement, improve financial sustainability, or boost program efficiency, metrics ensure that progress can be quantified and tracked over time.

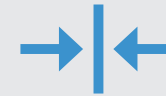
Key to the development or refinement of metrics is their measurability. Organizations should avoid vague or overly ambitious indicators that are difficult to track or quantify. Instead, they should focus on data that can be consistently gathered and interpreted.

A good metric will answer a specific question, such as “how much?” or “how well?” and provide a reliable gauge of progress toward a defined goal.

Aligning Metrics with Organizational Goals

Metrics should never exist in isolation; they must be closely tied to an organization's overall strategic objectives. When developing a strategic plan, the first step is to clearly define the outcomes the organization hopes to achieve.

Once these outcomes are established, the next step is to develop or refine metrics that will track progress toward these goals.



BY ALIGNING METRICS WITH GOALS, ORGANIZATIONS CAN ENSURE THAT RESOURCES, TIME, AND EFFORT ARE CONCENTRATED ON THE MOST IMPORTANT PRIORITIES.

Utilizing Existing Data Sources

Wherever possible, organizations should aim to set metrics that utilize existing data sources. Many organizations already collect valuable data through financial systems, customer feedback, operational reports, or external surveys. Leveraging this data reduces the burden of creating new tracking mechanisms and allows organizations to build on information they are already familiar with.

Furthermore, using existing data sources can often speed up the process of metric development and facilitate more immediate tracking of results.



Establishing Baselines and Targets

Setting baselines and targets is another critical element in the development of metrics. A baseline establishes the current level of performance, providing a reference point for future improvement. Targets represent the desired outcome within a specific timeframe and offer a tangible goal for the organization to strive toward.



BOTH BASELINES AND TARGETS CREATE A CLEAR ROADMAP FOR PROGRESS, HELPING ORGANIZATIONS TRACK PERFORMANCE AND IDENTIFY AREAS THAT NEED IMPROVEMENT.

Supporting Indicators for Tracking Progress

In addition to primary metrics, organizations should also consider establishing supporting indicators to provide a more comprehensive view of progress. Supporting indicators often track intermediate steps or related factors that contribute to the overall success of a strategic goal. For example, if the primary metric is to increase donor engagement by 20%, a supporting indicator might track the number of new outreach efforts or the response rate to donor communications.

These indicators offer additional layers of insight, helping organizations adjust their tactics in real time.



The ClearView Approach™

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At Schunk Moreland Strategies, we integrate metrics into strategic planning through our trademarked ClearView Approach™ to strategic planning.

As part of this methodology, we work closely with organizations to develop or refine measurable metrics that are directly aligned with their strategic goals. Our team emphasizes utilizing existing data sources wherever possible, allowing for a more seamless transition into metric tracking.

By establishing baselines, setting achievable targets, and identifying supporting indicators, we ensure that progress can be measured effectively. This process provides organizations with the clarity they need to track their success, adjust strategies in real-time, and achieve their long-term objectives.



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APPROACH™, WE EMPOWER
ORGANIZATIONS TO HARNESS
THE POWER OF DATA-DRIVEN
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ENSURE THAT WHAT GETS
MEASURED TRULY GETS
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