

# Strategic Review Processes

Before you develop a new strategy  
review your existing strategy first



# The value of strategic reviews

Even though, on the surface, there might not be an apparent need for a strategy review, you'll experience a number of benefits from taking the time to **evaluate performance** and **identify areas for improvement**.



## **Reinforces strategic, organizational and programmatic alignment**

To ensure integration and alignment; as well as efficiency and sustainability, a strategic review bring greater clarity of goals and objectives and it promotes collaboration, partnerships and teamwork.



## **Identifies new opportunities for innovation, scale and increased impact and return**

Understanding, considering and interpreting trends, challenges, threats and risks provides an opportunity to reassess effectiveness, materiality and relevance.



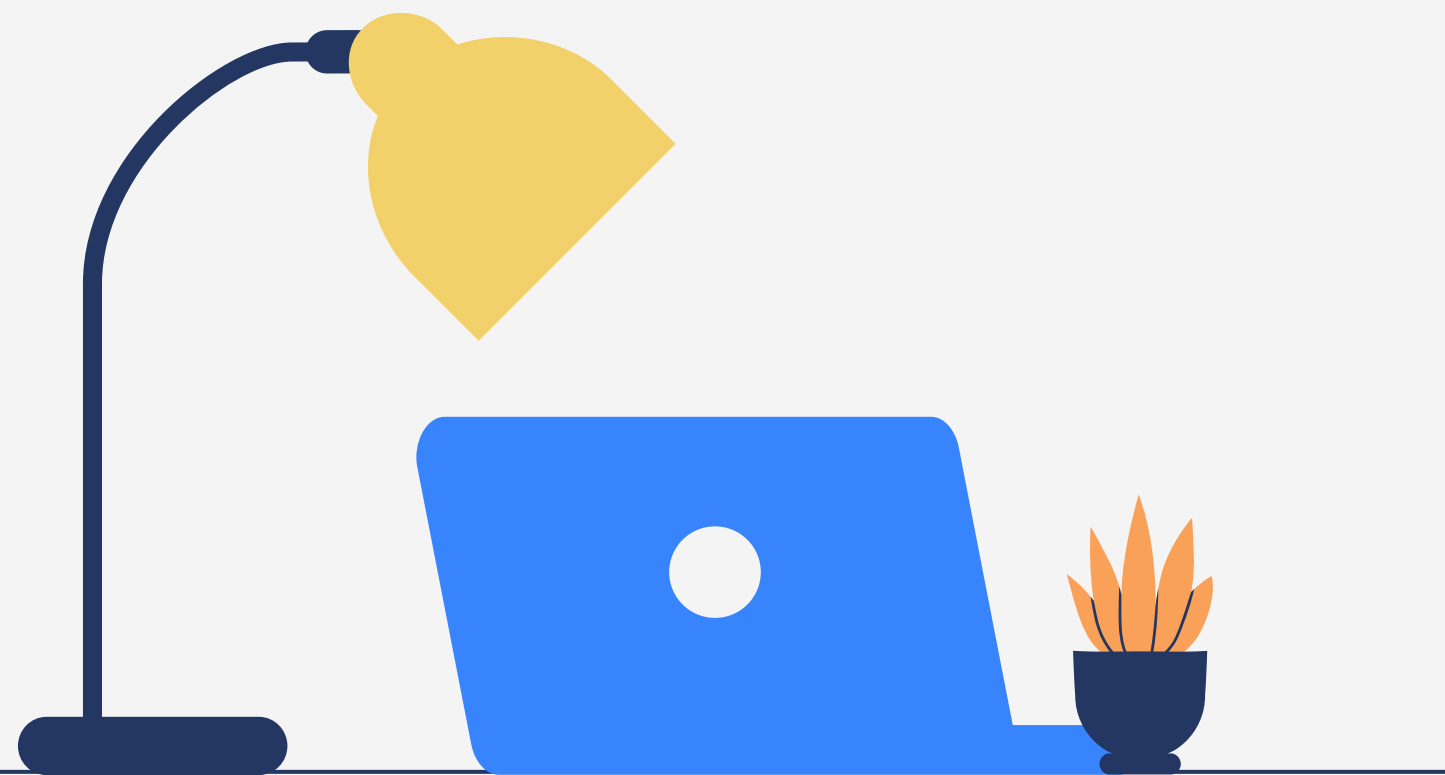
## **Provides opportunities for engagement and learning**

Understanding changing priorities, expectations and perceptions, learning from success and failure, brings insight for renewal and growth.



## **Minimizes risks**

Priorities and needs change constantly, global and local contexts are in flux. Flexibility and adaptability allows for timeliness, relevance and coherence.



# Strategic Review Process

Most organizations do a strategy review once a year, typically at the end of their annual cycle.

## Reviewing the big picture

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Question: Is your strategy still valid? What went wrong and what aspects delivered the best results?

## Review the context

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Conducting a landscape review, studying trends and doing comparative and competitive assessments, conducting a SWOT, GAP and PESTLE analysis will help you understand the future.

## Review the plan

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Question: Are your objectives and targets still relevant? Are our assumptions still valid? What does the results tell you?



# Inclusivity

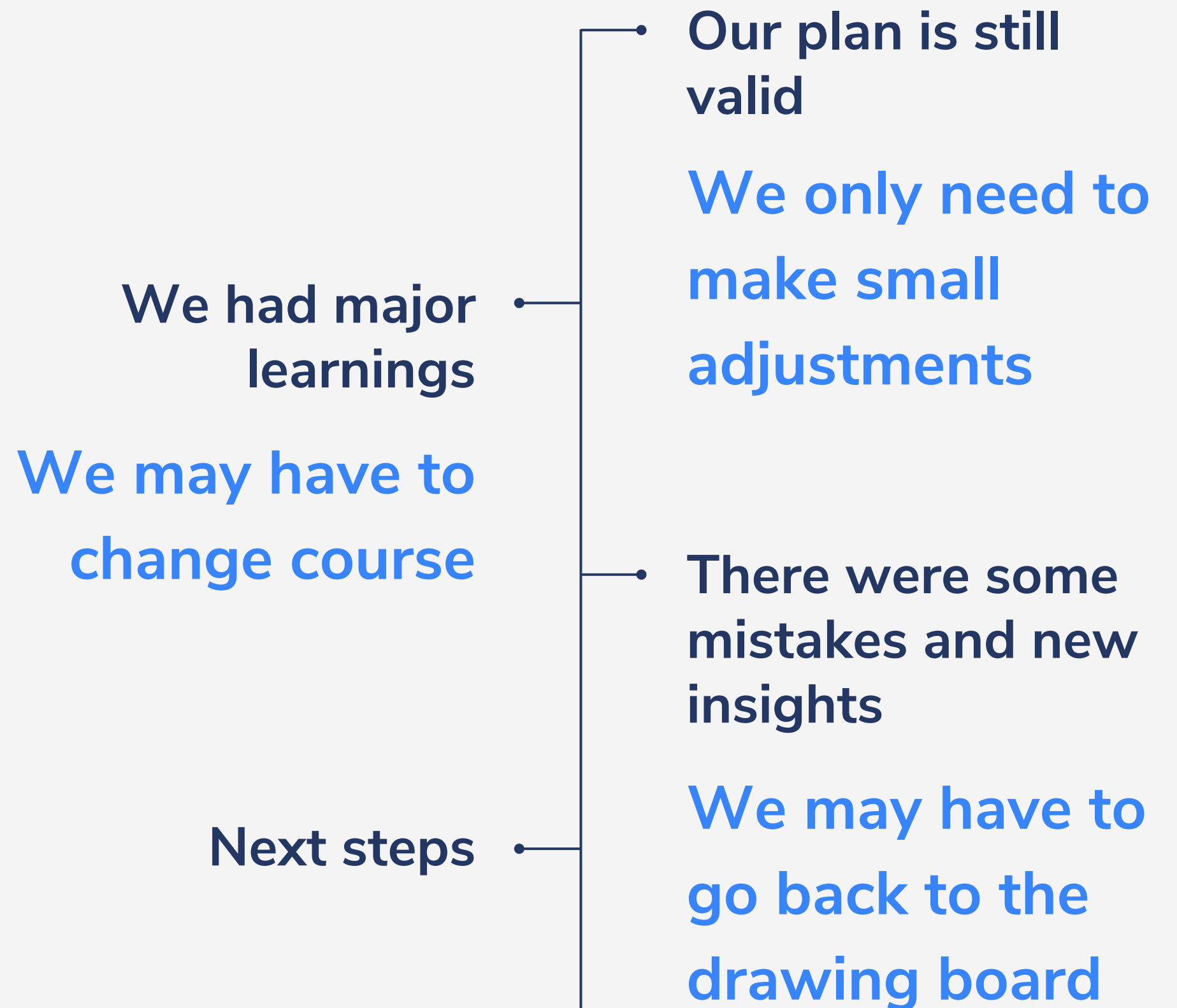
A strategic review process is not a one person job.

It requires input from internal and feedback from external stakeholders.

Also consider the opinions of subject experts.

# What to do with the results of the review process

It is seldom that a review process does not impact existing strategies as we live in a dynamic world.



# It's time to level up

## 01 Ensure your strategy is relevant

Whilst your strategic intent and objectives remain relevant, you may have to make adjustments in operations due to budget limitations, performance results and changing external contexts.

## 02 Ensure your strategy is effective

When your assumptions are challenged, and the operating environment changes, new trends and competitors emerge, you may have to make portfolio and program changes.

## 03 Ensure your strategy is sustainable

When the results and returns are not optimal, and the impacts not long lasting, your approach and partnerships will have to be reviewed.



# Key insights of the strategic review process

Strategic review processes informs future strategies, operations and programs



## Strategic

The outcome of a strategic review should be a clear set of strategic recommendations and a future roadmap for the organisation that charts its course and enables increased and sustained performance now and into the future.



## Operational

From a operational perspective the review process should set the direction for the immediate short to medium term and highlight the resource requirements (financial, human, technology, processes and systems, policies and governance) to take the strategy to the next level.



## Programmatic

Strategic objectives guide programmatic outcomes. Having a clear focus, theory of change and structured portfolios and programs with clear measurement processes and indicators will support the vision and anticipated outcomes of the organisation as well as allow you to communicate the results.



# Documenting the strategic review process

## Overall conclusions

WHAT WERE THE HEADLINE FINDINGS?

## Overall recommendations

WHAT NEEDS TO CHANGE?

## Possible scenarios

WHAT NEEDS TO BE RECONSIDERED?





# Developing a checklist

Based on the outcomes including the findings and recommendations of the strategic review process, a checklist is developed to a) develop a new strategy, b) update the existing strategy c) implement the changes.



## Strategic aspects

Includes the vision, mission, goals and objectives, values and principles, strategic intent, assumptions and strategic priorities.



## Operational Aspects

Includes key support functions (including information management, workforce development, processes, policies and systems, communication, and financial sustainability.



## Programmatic Aspects

Includes aspects of program design, program management and measurement, reporting, analysis and performance across the program life cycles.



Our value add

01

## We develop strategies

Next Generation have developed strategies for donors, grantmakers, philanthropists, social purpose organisations and social investors across the African continent.

02

## We review strategies

We understand the complexity of the humanitarian ecosystem and that contexts, trends and circumstances change constantly. We have reviewed strategies, operations and programs to ensure greater impact and return.

03

## We facilitate strategic sessions

We work with boards, trustees and management to understand the changing context. We prepare for decisionmaking, we facilitate learning and robust discussion. We develop scenarios to ensure risks are managed and opportunities are leveraged.

04

## We conduct research

Whether we develop strategies, review strategies, make strategic recommendations or facilitate strategic sessions our work is based on scientific evidence. We take responsibility for our recommendations and ensure our work can be benchmarked globally.

# Other services



## Strategy, consulting and advisory

We advise and develop strategies for impact and return on investment.

## Capacity development and training

We share our knowledge and present masterclasses on various topics including shared value, social innovation, socio economic development, corporate social investment, impact management and measurement.

## Research and development

We conduct both client and industry research, on specific topics and themes as well as broader industry trends across the continent.

# Contact Us



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