

# CAUSEY MASTERCLASS

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## PART 1

Welcome to Causey, your easy-to-use software that helps you organize, plan, and execute your organization's strategy.

You registered for the Causey masterclass when you signed up for the software and we're glad you did! This series is designed to give you a strong foundation by providing basic information for both our method of strategic planning (called the CAPE Cycle) and the software.

### What You Get

You'll receive 2-3 messages a week over the next few weeks. Each message will contain basic information about important strategic planning topics, including tips and how-tos in the software. We'll also share links and videos to more in-depth resources for reference.

### Stuck? Need Help?

Our help resources are linked on your home page of the software. We also recommend you bookmark our [support page](#).

To get in-app support, you can select the question mark in the upper right corner of any page. This pop-up will allow you to search support articles or ask a question.

[Help Resources in Causey](#)

### Your First Step

You don't have to wait to receive all of these emails to get started! [Log into Causey Now!](#)

# CAPE OVERVIEW

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## PART 2

At Mission Met, we think that the nonprofit sector is full of heroes. And what would a hero be without their cape?

The CAPE Cycle is the cornerstone of our process-based approach to strategic planning. CAPE is an acronym for an easy-to-follow, four-step annual planning cycle:

Champion

Assess

Plan

Execute



### Step 1: Champion

Perhaps the most important part of successful strategic planning is having at least one person champion the planning process. One of the first steps in your planning process is to identify your team's overall champion or co-champions.

### Step 2: Assess

In Step 2, you and your team will conduct an assessment of your organization. The two key benefits of an assessment process are:

- A body of qualitative and quantitative data that can guide the creation of your plan, and
- Your team's deeper engagement and buy-in to the strategic plan

### Step 3: Plan

After you've completed your organizational assessment in Step 2, you're ready to create a practical and focused plan.

## Step 4: Execute

The fourth step of the CAPE Cycle is, by far, the longest. It may also be the step that captures the least attention. That's because people are so often focused on creating the plan that executing it falls by the wayside.

The beauty of the CAPE Cycle is that if you do a good job in steps 1 through 3, then you're set up well to execute the plan.

The next four emails in this series will dive into more information about these steps.

### The CAPE Cycle: An Overview

## Additional Resources

[Support Guide for the CAPE Cycle](#)

[Strategic Planning Checklist](#)

[Sample Annual Planning Calendar](#)

[Blog: Your Strategic Planning Process](#)

## Your Next Steps

Assemble supporting documents that will be useful as you begin your planning process. This could include past strategic plans, previous organizational assessments, bylaws and governance documents, etc. Having these at hand will streamline the planning process as you progress through the steps.

# CAPE OVERVIEW: CHAMPION

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## PART 3

In the first step of the CAPE Cycle, one or two people from your organization will "champion" the strategic planning process. It's a critical first step because it emphasizes the foundational element that leadership plays in effective strategic planning.

Simply put, we've never seen an organization succeed with strategic planning that didn't have a person or two that "championed" the process. Never.

## CHAMPION

As the champion of your strategic planning effort, your primary responsibility is simply to ensure that your organization has both an effective plan and a process for executing it. That's it.

**The champion should ensure the following:**

- The plan and its supporting documents are accessible to everyone
- Team members know what they're responsible for
- There is a set of scheduled strategic planning meetings
- The team maintains a positive and supportive tone regarding planning
- The plan is regularly measured and reported on
- Everyone has the support they need to execute the plan
- Planning is approached as an ongoing process

[The CAPE Cycle: Champion](#)

## Additional Resources

[Support Guide for Champion](#)

[Blog: How a Co-Champion Can Transform Your Strategic Planning Effectiveness](#)

[Blog: The Power of Co-Leadership: A Conversation with Laura Andersen of LeadingX2](#)

## Your Next Step

Consider who within your organization should be designated as the overall Plan Champions and make sure that they have been invited to your organization on Causey!

# CAPE OVERVIEW: ASSESS

## PART 4

In the second step of the CAPE Cycle, you and your team will conduct an assessment of your organization.

A common problem with this step is that people want to assess everything and leave no stone unturned. It ends up taking many more weeks/months than needed and burns everyone out before the plan is even created. By adopting our simplicity principle to assessing your nonprofit, you can perform a rather quick assessment, engage the team, and still get the core themes on the table.

## ASSESS

The information collected throughout the assessment process will be used to inform your strategic plan and how it is executed.

The two key benefits of an assessment process are:

- A body of data that can guide the creation of your plan
- Your team's deeper engagement and buy-in to the strategic plan

We've simplified our assessments into a logical two-part process that directly connects to your strategic plan.

In Assessment Part 1, you'll assess where your organization is today.

In Assessment Part 2, you'll clarify your vision for your organization in three years and the actions needed to make that vision a reality.

The CAPE Cycle:  
Assess

### Additional Resources

[Support Guide for Assess \(includes links to our assessments\)](#)

### Your Next Step

Brainstorm some key areas of your organization that could use some focused assessment. Also consider how you might measure the information you collect during the assessment phase.

# CAPE OVERVIEW: PLAN

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## PART 5

Now that you've conducted your organizational assessment you're ready to begin creating your strategic plan, which is the third step of CAPE. Before we do that, however, we'd like to share some brief words of wisdom.

Resist the urge to try to create the perfect plan. Just roll up your sleeves and get going and see what you create. Remember that your plan will be updated indefinitely as you implement the CAPE Cycle. When it comes to planning, perfection is the enemy of good AND done!

## PLAN

We recommend a three-phase creation process.

### Phase 1: Analyze your Assessment Information

In Step 2 of the CAPE Cycle, you conducted a two-part assessment of your organization. Now it's time to begin organizing and analyzing that information to inform the creation of your strategic plan.

### Phase 2: Create a Draft Plan

We created an easy-to-understand two-section format for your plan – Section 1: Our Compass and Section 2: Our Actions. The Compass section provides you and your organization with overall direction and contains things like your mission statement, vision statement, and values. The Actions section is where you'll document the things that you and your team will do in pursuit of your Compass. Your goals will live in the Actions section. Make sure to get feedback from others in your organization during this phase!

### Phase 3: Finalize Your Plan

Once your plan is ready, it's time to put it into practice! This brings us to the final step in the Cape Cycle: Execute.

## Additional Resources

[Support Guide for Plan](#)

[Analyze your assessments worksheet](#)

## Your Next Steps

Analyze your assessment information and create a list of possible focus areas for your plan. We will cover focus areas in more detail in a future email within this series, but it is not too soon to start thinking about the high-level categories that will serve as the organizing framework for your plan.

[The CAPE Cycle:](#)  
[Plan](#)

# CAPE OVERVIEW: EXECUTE

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## PART 6

Of the four steps of the CAPE Cycle, it is hard to say which one is most important. But if we had to choose we'd pick Step 4 -- Execute.

This is the step where you and your team build your strategic planning muscle. Executing, measuring, and updating your plan -- week after week, month after month -- is how your organization will get stronger and be better able to hit its mission.

## EXECUTE

By completing Steps 1-3 of the CAPE Cycle you are already well-positioned for successfully executing your plan. The following suggestions will help you optimize to get the most out of your strategic plan:

### Measure progress on your goals monthly

It is important that your team's Goal Champions measure progress every month on the goals that they are championing. To help with this, Causey sends Goal Champions an automated monthly email with links to their goals so that they can quickly measure and report progress to the team.

### Use your Compass

A mistake we often see is that people focus on the goals of their strategic plan but lose sight of their Compass. Try to incorporate your Compass into your regular operations so it stays top-of-mind.

### Put your Plan on your calendar

Draft a strategic planning calendar at the beginning of the process will reserve time on all parties calendars so it's less likely to be forgotten.



## Additional Resources

[Support Guide for Execute](#)

## Your Next Steps

Make a commitment with your team that as you work through the Champion, Assessment and Plan steps that you will strive to keep things simple and clear. This way you can more quickly arrive at the Execute step, which is where you will start to see results from the hard work of building a strategic plan.

[The CAPE Cycle:](#)  
[Execute](#)

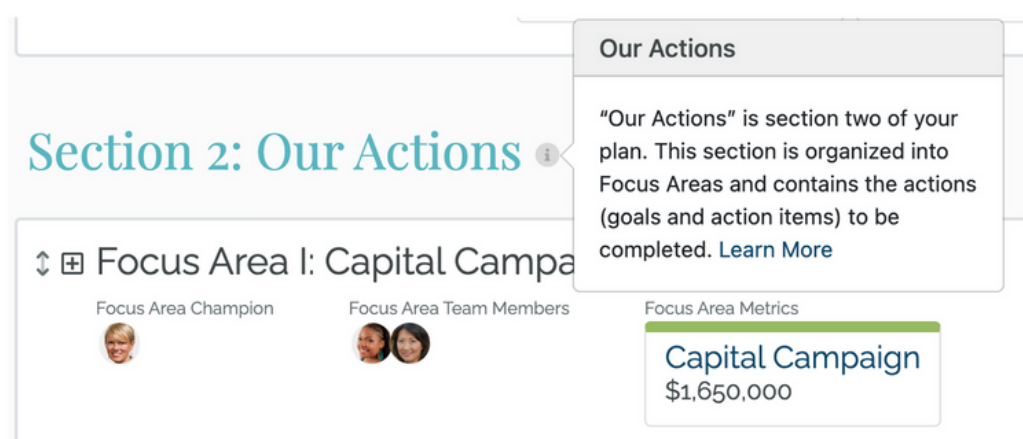
# MASTERCLASS: THE COMPASS

## PART 7

To avoid an overly complex strategic plan, we've created an easy-to-understand, two-section format for your plan in Causey:

- Section 1: Our Compass
- Section 2: Our Actions

\*Pro-tip -- Use the info icon (see below) to get more details about major concepts in the software.



## Your Compass

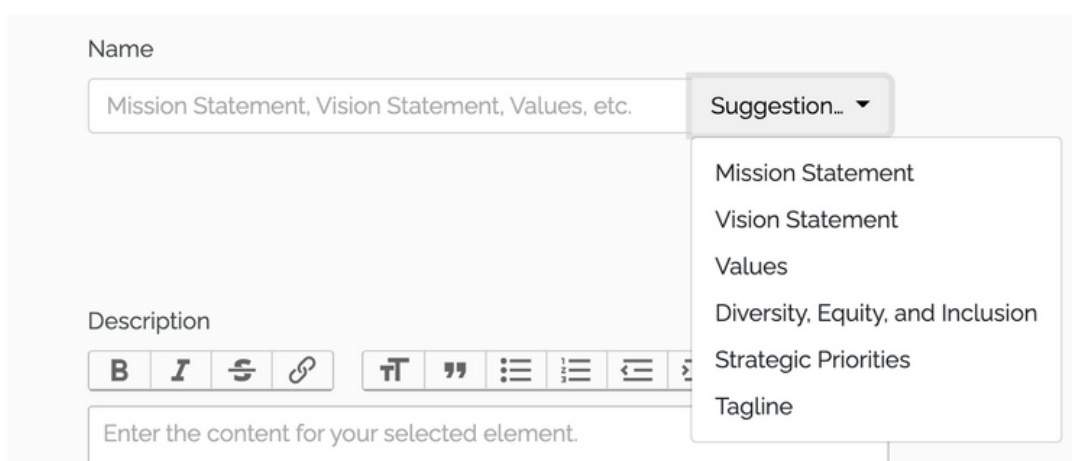
Like an actual compass, the Compass section of your strategic plan will constantly point you and your team in the right direction. It includes elements that provide timeless direction to your organization.

Your Compass will contain items such as:

- Mission Statement
- Vision Statement
- Core Values
- Key Metrics
- Strategic Priorities

If you're just starting out with your strategic planning, view only the mission and vision statements as essential. As your plan and process evolve you can include other elements.

Don't feel like you have to invent elements to populate your compass! We have provided several suggestions in the menu (see below).



The screenshot shows a web form for creating a 'Compass'. It has two main sections: 'Name' and 'Description'. The 'Name' section has a text input field containing 'Mission Statement, Vision Statement, Values, etc.' and a dropdown menu labeled 'Suggestion...'. The dropdown menu is open, showing a list of suggestions: 'Mission Statement', 'Vision Statement', 'Values', 'Diversity, Equity, and Inclusion', 'Strategic Priorities', and 'Tagline'. The 'Description' section has a rich text editor with a toolbar containing icons for bold, italic, link, unlink, text color, background color, bulleted list, numbered list, indent, and outdent. Below the toolbar is a text input field with the placeholder text 'Enter the content for your selected element.'

[Populate the Compass](#)

## Additional Resources

[Support Guide on Section 1: Our Compass](#)

[Blog: Impactful Mission and Vision Statements](#)

## Your Next Step

Hop into Causey and [start building your Compass!](#)

# MASTERCLASS: FOCUS AREAS

## PART 8

Our previous email focused on the first section of your plan, the Compass. Now let's dive into Section 2: Our Actions. (The next emails in this series will explain focus areas, goals, and action items.)

### FOCUS AREAS

Focus Areas are the organizing framework for the second section of your strategic plan, "Our Actions." They serve as a set of organizational areas that you and your team will focus on in your plan.

A common set of Focus Areas are:

- Programs
- Fund Development
- Board Development
- Marketing
- Operations

A well-structured Focus Area will have a long-term vision (typically three years) and a set of supporting goals (typically one-year or less), which we'll highlight in our next email.

[Add Focus Areas](#)

### Additional Resources

[Step-by-step instructions for populating Focus Areas](#)

[Support Guide on Focus Areas](#)

### Your Next Step

Get together with your key strategic planning team members and review the information from your assessment. Create a small set of focus areas -- typically no more than five -- and clarify the three-year vision for success in each area.

# MASTERCLASS: GOALS

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## PART 9

In our previous email, we described the role of Focus Areas in your strategic plan. After you've created your Focus Areas, you'll move on to setting an essential component of any effective strategic plan: Goals.

### Creating Powerful Goals

Writing strong goals is critical in order to take your vision and translate it into achievable, measurable steps.

Your goals should be specific and measurable desired achievements. If your goals are unclear or impossible to measure, it hinders your ability to execute your plan and leaves you with no clear benchmark to strive towards.

In Mission Met's approach, goals are no more than one year in duration and help you and your team attain a long-term vision for success in the respective Focus Area.

[Add Goals](#)

### Additional Resources

[Step-by-step instructions for populating Goals](#)

[Step-by-step instructions for measuring Goal progress](#)

[Blog: What You Need to Know for Setting and Measuring Your Strategic Plan's Goals](#)

[Blog: A Simple Research-Based Tip for Setting More Effective Goals](#)

### Your Next Step

What are the specific, measurable things that your organization wants to achieve? The answers to that question are your goals! Start considering who will champion individual goals, as this is key to establishing both ownership and a path to action!

# MASTERCLASS: ACTION ITEMS

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## PART 10

In the last email for the Causey masterclass, we helped you get a handle on goals. Now let's shift to breaking your goals into smaller steps called Action Items. This feature in Causey allows you to capture your shorter-term tasks that help you accomplish your goals.

### ACTION ITEMS

You walk a mile one step at a time. Similarly, you accomplish goals one Action Item at a time.

Action Items are key to executing your plan. Like goals, they are specific and measurable tasks that take anywhere from a few hours to a few weeks to accomplish. They should also have due dates and a person responsible for seeing it done.

[Add Action Items](#)

### Additional Resources

[Step-by-step instructions for populating Action Items](#)

[Support Guide on Action Items](#)

### Your Next Step

Remember to keep it simple! The best Action Items are concise and have clear endpoints. Action Items are a great way to get team members involved who aren't already championing a Goal or Focus Area. Consider how you might engage members of your organization via Action Items!

# MASTERCLASS: METRICS

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## PART 11

One of the major trends in the nonprofit sector has been a significantly increased focus on tracking an organization's metrics. Lucky for you, Causey simplifies the task of creating, measuring, and reporting on metrics.

## METRICS

By setting, pursuing, and analyzing progress toward a metric, you and your team will develop strategic skills that will help you run a more effective and impactful organization.

In Causey, you can capture Metrics at three different levels: Key Metrics, Focus Area Metrics, and Goal Metrics.

[Add Metrics](#)

## Additional Resources

[Step-by-step instructions for Metrics](#)

[Support Guide on Key Metrics](#)

[Blog: An Overview of Metrics on Your Strategic Plan](#)

## Your Next Step

What metrics do you want to track and measure? [Try adding a Metric to Causey!](#)

# MASTERCLASS: DOCUMENTS

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## PART 12

We hope you're enjoying Causey! Did you know that your strategic planning software offers a way to store documents? Use the Documents application to securely store any of your materials related to your strategic plan.

### DOCUMENTS

It's common for strategic plans to have supporting documents, including board operations, financials, meeting minutes, assessments, governance materials, project documentation, and marketing assets.

To simplify your strategic planning process, we recommend using the Documents application to store your materials. The convenience of having these documents stored with your plan means you have more time to focus on your goals.

Boards of directors, in particular, often find value in the Documents tool since it provides an easy-to-navigate virtual location that can be more accessible than other document storage platforms.

The Documents app allows you to organize your materials into 'categories' and you can upload a file (attachment), link to an external URL (link), or add rich text right into Causey (note).

[Add Documents](#)

### Additional Resources

[Step-by-step instructions for Documents](#)

### Your Next Step

Ever find yourself endlessly sifting through your Google drive looking for that fundraising assessment from a couple of years ago? Upload them to the Documents app in Causey instead!