

Transform your Strategic Plan into Strategic Performance



PLAN

COLLABORATE

ASSESS

ALIGN

SUSTAIN

SUPPORT

we PlanWell TM

*better planning
better performance*

COMPREHENSIVE, ONLINE STRATEGIC PLANNING TOOL

Advance your planning process



Powerful, yet simple to use, WePlanWell streamlines your strategic planning process, improving efficiency at every step. WePlanWell is an intuitive tool designed to help drive the implementation and management of your plan. Developed by a team of strategic planning consultants, WePlanWell is both a comprehensive, online strategic planning tool and a powerful strategic performance tool.

plan | assess | perform | align | sustain

BUILD PLAN

[For More Information](#)

Flexible, time-saving features for better plan development

Our flexible process for creating, implementing and managing your Strategic Plan offers you the ability to customize many areas in WePlanWell to meet your organizational needs, including nomenclature. As an online tool, WePlanWell centralizes the Strategic Plan data. When you update one area of the plan the change is made everywhere, from the plan documents to the assessment scorecards, saving you time and ensuring that users always have access to the most current version. It also means that your current plan is available to your staff and team anytime, anywhere, through WePlanWell.

COLLABORATE

Simple, efficient cooperation

The WePlanWell collaboration feature makes working with staff and other key stakeholders easier than ever before. This cooperative editing feature allows users to suggest, review and comment on changes to selected areas of the plan. Imagine how much time you can save with this simple, efficient way to update or revise Mission or Vision Statements or any part of your strategic plan.

plan | assess | perform | align | sustain

ASSESS & REPORT

[For More Information](#)

Ensure implementation with assessments and reports

A Strategic Plan is only as good as its implementation. That is why we built accountability into the WePlanWell tool. Our assessment features and scorecard reports provide you with at-a-glance information about what efforts are moving forward and where there are roadblocks to overcome. A range of reporting options makes it easy to measure and report on plan implementation and performance at both management and governance levels.

ALIGN

[For More Information](#)

Tie individual performance to the Strategic Plan

WePlanWell offers a comprehensive Individual Performance Planning feature that you can use to automatically create individual performance plans for all team members directly from the Strategic Plan. This can supplement an existing performance evaluation process, or become the basis of a new one. This feature gives organizations the ability to set and track individual goals that directly align with the strategic plan. No other strategic planning and performance tool offers anything like it.

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SUSTAIN

[Features for Non-profits](#)

Ongoing Plan Implementation

After investing time, energy and money in the creation of a Strategic Plan the last thing any organization wants is for that plan to wind up on the shelf gathering dust. WePlanWell gives you the tools you need to sustain the implementation of your Strategic Plan over the long term and use the plan as your ongoing roadmap.

SUPPORT

Full training and support

When you become part of the WePlanWell community, you gain access to comprehensive training and technical support to help your team implement your strategic plan and achieve its goals.



For more specific information on:

Building the plan, entering and editing plan content—pages 7-8

Easily and effectively managing the ongoing assessment and reporting of progress—pages 9-10

Aligning individual performance to the strategic plan—pages 11-12

Special features for non-profit organizations to align staff and board to the Mission—pages 13-14

To learn more, or to arrange a demonstration, contact your strategic planning consultant or email contact@weplanwell.com



BUILD THE PLAN

You can create, revise and update the plan easily and efficiently, allowing all plan users to have ready access to the most current version.

EXCELLENCE



BUILD THE PLAN

BETTER PLANNING ————— BETTER PERFORMANCE

Keep your strategic plan alive and truly serving as your roadmap instead of gathering dust on the shelf. With WePlanWell you can add, edit and save plan content simply and easily, allowing you to spend more time implementing the plan and less time administering it.

With WePlanWell you can:

- Create robust plans that provide high-level strategic direction and performance measures. Build implementation tactics including specific timeframes, responsible parties and resources required to achieve your goals.
- Edit quickly and easily. The change is immediately reflected in every report and document affiliated with it.
- Use the built-in electronic whiteboard feature to enhance brainstorming during plan development or updating.
- Customize plan nomenclature to fit your organizational language.
- Collect suggestions from key stakeholders on plan elements, such as Mission Statement, using WePlanWell's unique Collaboration feature. See all suggestions at-a-glance and use this feedback to speed the planning process and encourage buy-in.

This intuitive and flexible tool can streamline your planning process and assure that you will implement your plan more efficiently and effectively. This leads to exemplary performance.

To learn more: Contact your strategic planning Consultant or email contact@weplanwell.com

[return](#)

ASSESS & REPORT

Keep the plan alive and in action with our efficient system for assessing plan progress. Run various versions of the plan, as well as reports, to review achievements and determine next steps.



EXCELLENCE



ASSESS & REPORT

BETTER PLANNING ————— BETTER PERFORMANCE

The strategic plan you develop is intended to be your roadmap to the future. But a plan is only as good as its implementation. Careful tracking, ongoing assessment and reporting of key performance measures and significant activities associated with the plan will drive your journey.

With WePlanWell you can:

- Assess the plan at every level, from high level initiatives and performance measures to specific individual tactics.
- Assess and comment on progress on all plan elements, including percentage complete, by quarter and by year.
- Automatically pull data from assessments into scorecard reports for at-a-glance information about performance and progress at both high level Governance and day-to-day Management perspectives.
- Access the Planning Calendar, automatically created as the plan is developed, which lists objectives, actions, responsible party(s) and the most current assessment of the plan elements.
- Analyze the Resource Planning Calendar, also created automatically as the plan is developed to view by type, plan year and responsible party all the resources required to implement the plan.
- Export plan documents, assessments and reports in several formats for easy copying and presentation.
- Update any element of the plan and immediately find the change reflected in all reports and assessment options.

As a WePlanWell user, you can access a tool that assures plan execution that is easier to monitor and more straight forward to assess than ever before.

To learn more: Contact your strategic planning Consultant or email contact@weplanwell.com

INDIVIDUAL PERFORMANCE

The Individual Performance Planning feature offers a tool you can use to assure that each employee’s time and energy is focused on the highest level priorities and the strategic plan.



EXCELLENCE



INDIVIDUAL PERFORMANCE PLANNING

BETTER PLANNING ————— BETTER PERFORMANCE

One of the keys to successful strategic plan implementation lies in specifically linking the performance of every individual employee, every stakeholder, to the plan itself. The Individual Performance Plan (IPP) feature of WePlanWell gives users the ability to easily identify, track and measure performance goals for everyone with responsibilities connected to the plan. It can also serve as the complete Individual Performance Management system for the entire organization.

With the IPP feature you can:

- Easily align employee performance goals with strategic plan goals; each employee can instantly download their strategic plan responsibilities directly into their individual plan.
- Expand the IPP to reflect strategic plan responsibilities as well as day-to-day job requirements and individual development goals.
- Support and enhance your existing performance management process. WePlanWell delivers an accurate and effective tool for identifying, tracking and measuring performance deliverables for every employee. Use it to take your performance management process to a new level.
- Utilize the IPP assessment feature, available to both employee and manager, for tracking and reviewing individual performance. This tool captures the assessments and comments made by both parties on each element of the IPP.
- Create at-a-glance reports making it easy to identify where progress is being made or where additional attention, review or support is needed.

The Individual Performance Plan feature offers a tool you can use to assure that your organization's time and energy is focused on the highest-level priorities of the plan. IPP is just one of the innovative features offered by WePlanWell, which can help transform your strategic plan into strategic performance.

To learn more: Contact your strategic planning Consultant or email contact@weplanwell.com



UNIQUE FOR THE NONPROFIT SECTOR

WePlanWell's easy access and efficient features provide great information to key stakeholders. This tool facilitates boards and their committees to stay aligned with the plan and readily carry out their plan oversight responsibilities.

EXCELLENCE



UNIQUE FEATURES FOR THE NONPROFIT SECTOR

BETTER PLANNING ————— BETTER PERFORMANCE

Today nonprofit organizations are being challenged as never before to assess their operating structures, evaluate their mission and programs and justify their budgets. Forward-thinking organizations are seeking ways to thrive in this new environment, not simply survive. Strategic planning is the key.

Using WePlanWell gives your organization and board the ability to:

- Align staff, board and committee efforts and performance directly to the mission and strategic plan.
- Generate board member and committee To Do Lists with responsibilities directly from the strategic plan using Reports and Individual Performance Planning (IPP) features.
- Focus board and committee meeting agendas and efforts on Governance responsibilities and oversight of strategic plan implementation, utilizing the Assessment and Reports features.
- Transform the plan review and revision process using the Collaboration feature. Board and staff members can log into the plan from anywhere and leave comments on plan elements that other members can easily see at-a-glance.
- Eliminate hours of preparation each month by streamlining the creation of informative reports, including Scorecards, to provide efficient and effective communication with board and committees about plan progress.
- Pull information for grant requests or reports to the board or funders quickly and easily.
- Update the Strategic Plan per board or committee input with just a few clicks of the mouse.

Developed by experts in nonprofit strategic planning, WePlanWell is designed to help your nonprofit organization stay current, stay focused and stay on track.

To learn more: Contact your strategic planning Consultant or email contact@weplanwell.com