Wisconsin DOR – Strategic Planning

Appreciative Inquiry
#1 - Positive image, positive action

What we look for, we find.
What we pay attention to, grows.
#2 - Participatory & Inclusive

People commit to what they help to create.
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**Appreciative Inquiry 5D Process**

- **Define**: Decide what to study, how and who to involve in each phase
- **Dream**: Envision the future – aspirations & desired results
- **Design**: Create the technical & social structures which make the vision inevitable
- **Discovery**: Conduct the inquiry, share insights around strengths, exemplars, opportunities
- **Delivery**: Improvisation & Inspired Action (Roadmap)

The process is cyclical, starting with Define and moving through the stages in a circular manner.
SOAR analysis

**Strategic Inquiry**

**Strengths**
What are our greatest assets, exemplars, and most valued?

**Opportunities**
What are the opportunities for innovation and improvement?

**Aspirations**
What is our preferred future? “Moonshot” hopes?

**Results**
What are the measurable results and desired impact?

Adapted from Stavros, Cooperrider, Kelley (2003)
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**Department of Revenue (DOR)**

**Strategic Planning Process**

1. **Definition (July)**
   - Desired Outcomes/Topics?
   - Who to involve?
   - How best to engage?

2. **Pre-Retreat Discovery (Aug-Oct)**
   - SOAR Analysis: Strengths, Opportunities, Aspirations + Results
   - Seed and strengthen relationships - internal and external

3. **Strategy Dream + Design Retreat (Nov)**
   - Shared VISION
   - 3-5 GOAL AREAS
   - INITIATIVES by goal area
   - ROADMAP - key milestones, timeline

4. **Post Retreat Delivery**
   - Action planning, cont’d
   - Roles, structure for implementation
   - Next steps for sustaining engagement and momentum