



# Strategic Plan Refresh

## Visit Mendocino

September 23, 2020

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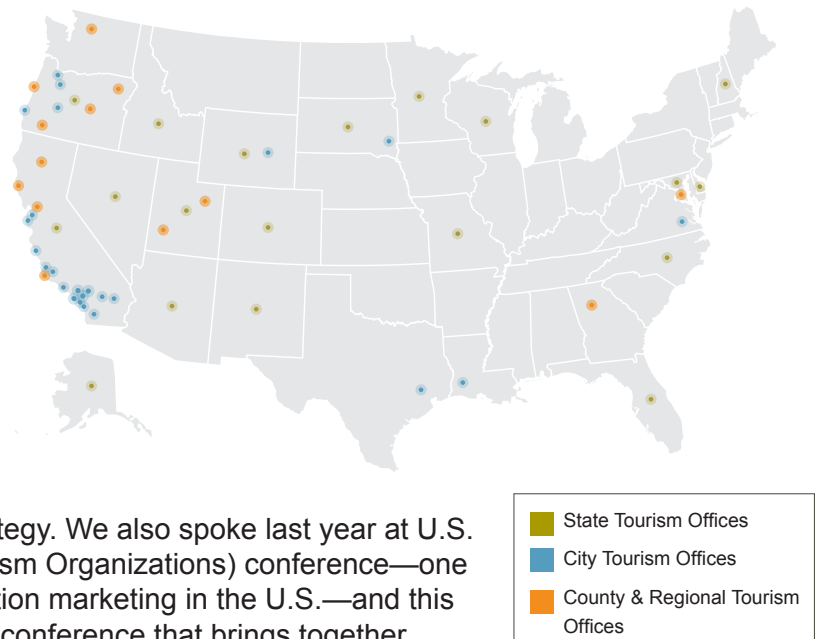
## About Us



Since 2005, Coraggio has been helping tourism leaders envision their organization’s future, create exciting plans, and foster the agile teams they need to get there. Our team helps clients better understand their rapidly changing operating environments, determine how to respond to complex challenges and position their organizations and destinations to seize the right opportunities.

Coraggio is the only firm in the U.S. that has our powerful combination of strategy expertise, organizational effectiveness and destination marketing experience at every scale within the travel and tourism sector, as evidenced by:

- We have been hired by U.S. Travel—for the fourth year running—to design and lead their annual leadership forum for state tourism directors (National Council of State Tourism Directors). These forums emphasize practical ways to strengthen leadership and organizational effectiveness.
- This year alone, we have been or will be featured speakers at the Oregon, South Dakota, Arizona, Missouri, New Hampshire and Utah state tourism conferences, where we are speaking on organizational effectiveness, destination perception and strategy. We also spoke last year at U.S. Travel’s ESTO (Educational Seminar for Tourism Organizations) conference—one of the biggest annual conferences for destination marketing in the U.S.—and this year will facilitate the second annual WESTO conference that brings together leadership from most of the 15 states that make up the Western States Tourism Policy Council.
- We have worked directly with the leadership teams and industry stakeholders of eleven state tourism offices, and with dozens of city and county tourism agencies nationally.
- In addition to travel & tourism industry expertise, our team members have backgrounds in marketing and economics that help them understand the unique needs of destination marketing organizations.





# Destination Marketing Experience

Helping our tourism clients take big leaps forward is what we do best.



Our work with Coraggio has already transformed the way our department thinks, acts and plans for the future. They have made the process of strategic planning and leadership development challenging, thought-provoking, inspiring and, dare I say, fun? When thinking about Coraggio, the attributes that stand out the strongest for my team and me are 1. How deeply they care about our organization and about each individual in the organization 2. How engaged and fully 'in this' they are with you 3. How much they want to see you succeed, personally and professionally. They have an outstanding grasp of the inner workings of Destination Marketing Organizations. We couldn't recommend their work more highly.— James Hagen, Secretary

South Dakota Department of Tourism



# Strategic Planning Approach

We help tourism leaders and their teams Get Clear, Get Focused and Get Moving on their most important strategic and organizational challenges.



**308** Strategic Plans Executed Since 2005 For Both Public & Private Organizations

Companies that are the most successful at implementing new strategies and reaping their benefits tend to do two things right: they get early buy-in from key stakeholders and make sure their leaders have the skills and willingness to see them through. We call this approach “integrating people and process for impact.”

This requires top leadership to advance on three tracks: developing the strategic plan, building key support for that plan, and ensuring their organization can execute it. In other words, strategy development, stakeholder development, and leadership development (right).



Running these three processes concurrently is critical as they inform each other. Approaching them in phases or neglecting any one of them is like trying to fly a plane with one wing. Leaders willing to tackle all three simultaneously are more likely to achieve their plan's desired outcomes.

To read more about how we think about tourism strategy development visit: [www.coraggiogroup.com/whitepaper-library](http://www.coraggiogroup.com/whitepaper-library) to download our whitepaper.



# Scope of Work

Coraggio proposes a straightforward, three-phase framework to Get Clear, Get Focused, and Get Moving on Visit Mendocino County’s strategic plan refresh. We have identified the general components of our approach including deliverables for each stage, as detailed below.



## Phase One: **Get Clear**

The Get Clear phase represents the foundation for the project and sets the stage for early wins and ongoing success from start to finish. We will work with you to create and maintain the conditions necessary for an open, transparent, and innovative strategic planning process—one that serves as a galvanizing mechanism for further unifying your stakeholders and consistently reflects the values of the organization.

### **Kickoff Meeting**

To start from a solid foundation, we will meet your Executive Director and perhaps one or two key Board members in a 90-minute virtual work session to understand the big picture from your perspective and clearly define success as it pertains to this project. We will also want to get clear on the range of stakeholders who need to be engaged to make this work a success. We will come prepared with an outline, educated questions, and a recommended approach for the project plan and stakeholder engagement approach.

### **Stakeholder Engagement**

We believe that a wealth of wisdom and good ideas come from within an organization and its external stakeholders. Therefore, the majority of our projects include a series of organized interviews, focus groups, and surveys. We tailor our approach to meet the specific needs of the organization. Based on our experience working with you in the past, we recommend:

- Eight one-on-one phone interviews with a mix of board and staff
- An online survey for stakeholders—Board members, tourism industry partners, community members, and other partner organizations—to help us build a broad understanding of the opportunities and challenges facing the visitor economy in Mendocino County





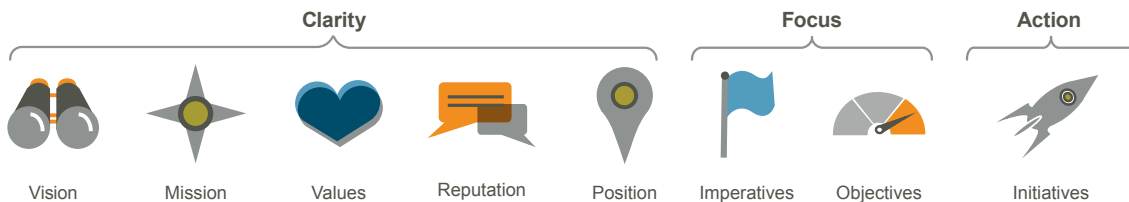
We will use what we learn in the kickoff meeting to develop an organized approach with targeted questions that draw out the needed information while demonstrating to participants that this process is being accomplished with them, not done to them. Our questions will be both strategic and tactical—we will want to understand how they envision the future of tourism in Mendocino County, and how Visit Mendocino County can make progress toward that future.

### Insight Report

We will work to create a report that summarizes the various themes and insights from the immersion and engagement efforts. We will support each theme with data and anonymous quotes from our interviews. The report will provide us decision criteria by which to filter strategic decisions that will be made during the planning process. In other words, we will have a way to ask the question, “How does this decision support or align with the insights we gathered in our engagement activities?”

## Phase Two: Get Focused

The Get Focused phase is where we will roll up our sleeves and get to the work at hand: building the strategic plan for Visit Mendocino County. This plan will provide an overall strategic vision for the organization, and a plan to make progress toward that vision over the next three years. That plan, and the process to create it, follows our flexible Strategic Planning Framework.



We propose drafting these elements in four focused, high-energy workshops with your Strategic Planning Team. We propose that these workshops to be held in a once-a-week cadence via Zoom or similar video-conference technology. Should the opportunity to hold face-to-face meetings arise, we would recommend scheduling two pairs of meetings on back-to-back days, approximately two weeks apart to save on travel costs.

### Strategic Planning Work Session One: Insight Report and Review Strategic Clarity

In the first work session, we will begin by sharing our Insight Report, detailing what we learned through interviews and survey. We will then spend the rest of the work session focusing on the part of the plan we call “Strategic Clarity.” This is the high-level view of your strategy, and includes the following elements:

- **Vision** - What is the ideal future state we are trying to create?
- **Mission** - What is our purpose? What are we here to make happen?
- **Values** - What are the fundamental beliefs that shape how we work together and serve our mission?
- **Reputation**- What do we want to be known for? What is the enduring perception or emotion that describes the total experience of our organization?
- **Position** - What unique and sustainable value do we deliver, where do we deliver it, and for whom?

Recognizing that you have these elements in place from your past strategic planning process, we see the work in this first session as revisiting the existing elements of your Strategic Clarity to see if they still serve the organization as written and revising them if needed.

### Strategic Planning Work Sessions Two and Three: Strategic Focus and Action

In the second and third sessions, we will work with the team to define your Strategic Imperatives and to define the remainder of the “Focus” part of the plan and the “Action” part of the plan, including these elements:

- **Strategic Imperatives** - What must be accomplished over the planning horizon?
- **Objectives** - How will we measure success?
- **Initiatives** - What collective, transformative actions do we need to take to achieve our Imperatives?

## Phase Three: Get Moving

### Strategic Planning Work Session Four: Plan Finalization

In the final session, which will be a single half-day, we will work with your team to revisit and finalize all the elements of your Strategic Plan, as well as prepare for communicating the plan to your Board and stakeholder community. We will use this session to polish the language in the plan and check the new plan against the Insight Report to ensure it addresses the needs of your stakeholders. At the end of this session we recommend inviting the full Board to participate in a feedback session where the planning team walks the Board through the draft plan and lets them ask questions and provide feedback.

### Strategic Plan Documentation

Once we complete the workshops and have feedback from the Board, we will take some time to collect everything the strategic planning team decided into one coherent document. We have a one-page Strategic Plan format that has proven very effective at helping participants and non-participants alike to understand the overview of the strategic plan, while also being able quickly reference the specifics. In this way, the final document acts as both a guide to working the plan, and as a tool for communicating it.



# Investment

Phase of Work		Task Subtotal
<b>Get Clear</b>	<ul style="list-style-type: none"> <li>• Kickoff Meeting</li> <li>• Stakeholder Engagement</li> <li>• Insight Report</li> </ul>	\$10,444.20
<b>Get Focused</b>	<ul style="list-style-type: none"> <li>• Strategic Planning Work Sessions 1-3</li> </ul>	\$10,608.00
<b>Get Moving</b>	<ul style="list-style-type: none"> <li>• Strategic Planning Work Session Four</li> <li>• Strategic Plan Documentation</li> </ul>	\$4,409.60
<b>Project Total:</b>		<b>\$25,461.80</b>

**Administrative Fees**

We have included a 4% administrative budget to cover administrative tasks, printing, print production, and other expenses.

**Terms**

All activities are invoiced on a monthly basis and are due net 15. Should travel become possible and should any work sessions be scheduled in-person in Mendocino county, we will invoice travel amounts at cost, additive to the consulting budget.





## Project Team



### Matthew Landkamer

#### Principal

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As the lead of Coraggio’s Travel & Tourism practice, Matthew focuses on bringing strategic thinking and an innovation mindset to destination marketing organizations and attractions alike. His art and design background, combined with hands-on business experience, allows him to bring a unique balance of creative design thinking and strategic rigor to each of his client engagements. He is a skilled facilitator and problem solver with an impressive ability to start the conversations that need to be had inside organizations, and among organizational leaders—the kind of conversations that lead to valuable insights, bold thinking and needed results.

- B.A. in Fine Arts, Nebraska Wesleyan University
- Certified in PROSCI® Change Management
- Certified in Public Interest Design, SEED Network

He has worked with tourism organizations at every scale—from rural communities such as Visit Casper and Visit Mendocino County; to metropolitan destinations such as San Francisco Travel and Travel Portland; to state tourism agencies such as Visit New Hampshire and Visit California; and to tourism attractions such as NBC Universal Studios Hollywood. He is keenly interested in fostering regional collaboration in destination marketing and in bringing the voice of the visitor into the room as a strategic input.

When he isn’t working with his clients, you’ll find him throwing pots, strumming a guitar or hoisting a backpack and getting “lost” on a beautiful Pacific Northwest trail.

