

Tools for Assessing Readiness and Planning for Expansion/Progression

ERG Strategic Planning Worksheet

ERG NAME: _____

1. Start, stop, continue

- Explore with an open mind the current initiatives to determine what you will initiate next year that aligns with your ERG's and organizational goals.
- What initiative should be stopped as it cannot be expanded and amplified or is not the best use of your resources?
- Discuss what initiative has the potential to have greater impact, can be expanded across the organization or across ERG's with measurable outcomes over time.
- Identify collaboration opportunities with other ERGs to drive scale/impact. Which one(s) and explore how? Examples: can we combine efforts under career development in FY20 with another ERG?

2. ERG Leadership Succession Planning

- Discuss leadership needs, assess the tenure of your current leadership team (executives, leads, initiative owners), do you need to facilitate transitions?
- Do you have a pipeline created for the various leadership roles?
- Whom can you actively identify and recruit now for succession planning? What skills are needed most (e.g. marketing, sales, communications, financial, project management)?
- Are the role definitions & expectations clear for all levels of leadership?
- Can we share skills across the ERGs?

ERG FOCUS AREAS IN FY19 AND FY20

A. Career (growing, educating and acquiring diverse talent, etc)

Describe your top initiative: _____

- What metrics are you using to measure the progress and impact of the initiative?
- What will you need (information, key stakeholders, resources) to execute this initiative in FY20?
- Can you partner with other ERGs to drive scale & impact? Define and list target ERGs
- Define your initiative for FY20 and set a metric/goal to measure & report progress

Actions	Owner	FY19	Q1FY20	Q2FY20	Q3FY20	Q4FY20

B. Commerce (customer engagements, partnership with sales/marketing/engineering, etc.)

Describe your top initiative: _____

- What metrics are you using to measure the progress and impact of the initiative?
- What will you need (information, key stakeholders, resources) to execute this initiative in FY20?
- Can you partner with other ERGs to drive scale & impact? Define and list target ERGs
- Define your initiative for FY20 and set a metric/goal to measure & report progress

Actions	Owner	FY19	Q1FY20	Q2FY20	Q3FY20	Q4FY20

Tools for Assessing Readiness and Planning for Expansion/Progression (continued)

C. Culture (cross ERG collaboration, membership/footprint expansion, inclusion efforts, support MARC 2.0, etc)

Describe your top initiative: _____

- What metrics are you using to measure the progress and impact of the initiative?
- What will you need (information, key stakeholders, resources) to execute this initiative in FY20?
- Can you partner with other ERGs to drive scale & impact? Define and list target ERGs
- Define your initiative for FY20 and set a metric/goal to measure & report progress

Actions	Owner	FY19	Q1FY20	Q2FY20	Q3FY20	Q4FY20

D. Community (external community efforts, partnerships with diverse organizations, etc)

Describe your top initiative: _____

- What metrics are you using to measure the progress and impact of the initiative?
- What will you need (information, key stakeholders, resources) to execute this initiative in FY20?
- Can you partner with other ERGs to drive scale & impact? Define and list target ERGs
- Define your initiative for FY20 and set a metric/goal to measure & report progress

Actions	Owner	FY19	Q1FY20	Q2FY20	Q3FY20	Q4FY20