**Strategic Mapping Technology Worksheet**

***Instructions:*** Read and complete the following steps.

1. Do research on the health and welfare needs in the area(s) where your organization works. If some of the staff in your organization who work directly with clients are not part of the core business planning team, interview them before the team meeting to learn what they know about the needs and preferences of the people you serve—and of people not currently served by your organization, but who might be future clients.

*Remember that during a brainstorming session, the idea is to generate as many ideas as possible. Focus on your team’s creative energy and new ideas. It is best to openly brainstorm ideas and to not criticize new ideas at this stage.*

1. Get a map of your country or catchment area. Make sure it is a large map that everyone in the group can see.
2. Review your list of current products and services that are on the Product and Service Inventory Worksheet.
3. Complete the following instructions to create the strategic map:

* Based on your research and interviews, write down your clients’ health and welfare need(s) or preference(s) on index cards or Post-it notes. (Write only one need or preference per card.) Use as many cards as needed to capture all of the needs and preferences that you identified during your research and interviews.
* Tape or glue each card to the map in the appropriate location(s) where the needs or preferences have been identified (for instance, if your organization works throughout the country and there is a risk of malaria only in the coastal area, then the card describing the need for malaria prevention work should be taped to the coastal area shown on the map).

1. Match your current products and services to the needs and preferences shown on the map.

* If your organization is meeting the needs or preferences in an area shown on the map as best it can, mark the post-it or card with a plus sign (+).
* If your organization is not currently meeting the needs or preferences as well as possible, mark the post-it or card with a minus sign (-).
* All index cards marked with a minus sign (-) represent the gap between what your clients want and need, and what you are offering them right now.

1. Brainstorm ideas that could address this business challenge and fill the gaps.

* Ask yourselves: Now that we know about the gaps, what can we do to fill them? What are we as an organization compelled to do—what types of products or services must we offer – and where - if we are to close the gaps identified and live up to our mission and vision, leadership, and history?
  + These new products or services might be for existing clients, or for people who are not yet clients of your organization.
  + These products and services may not be new, but may be introduced to new market segments or new geographical areas.
* Ask yourselves: Does the organization have the leadership, management and technical competencies to deliver these products and services to an existing or a new market?

1. Prepare a brief statement to describe the organization’s potential new scope.

* The new client populations your organization should target, if any.
* The new geographic areas your organization should target, if any.
* The innovative products and/or services the organization should offer to meet the health and welfare needs of its currently targeted populations, as well as the needs of new populations and geographic areas.

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