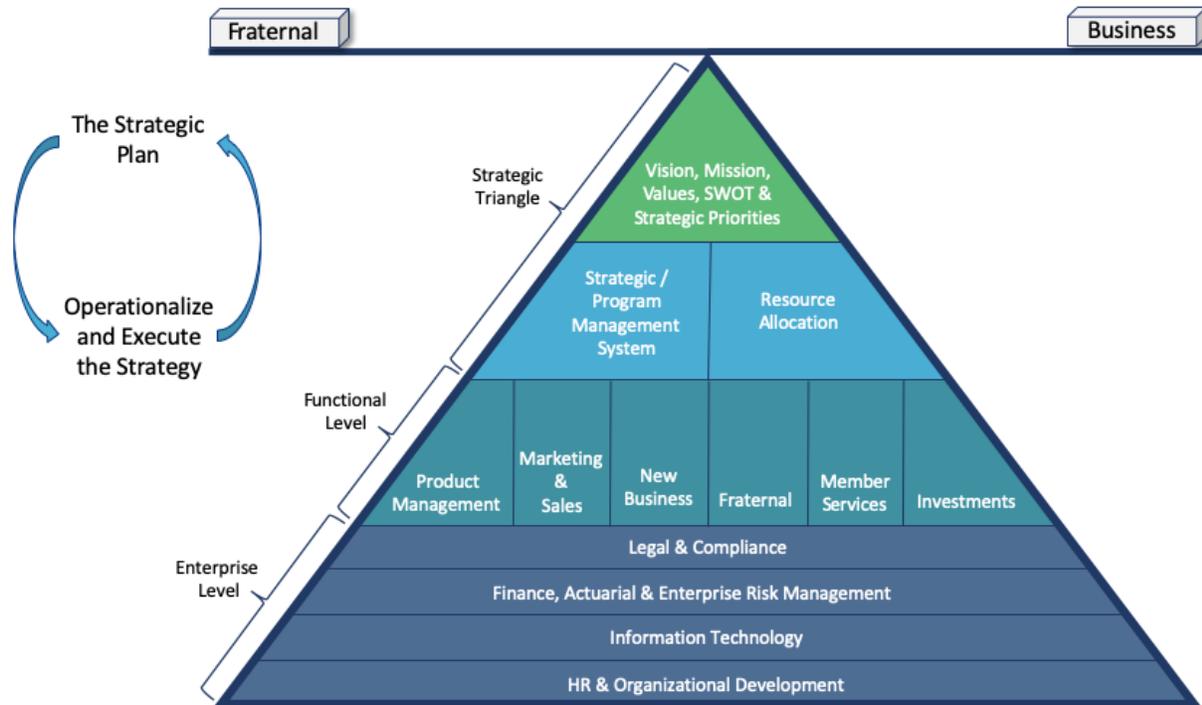


# The Integrated Enterprise – A Strategic Framework

## Executive Summary

This framework provides a holistic view of an organization’s journey in developing, operationalizing, and executing its strategy. It is intended to serve as a guide for organizations that are about to undertake strategic planning activities or may be executing their strategic plan and has been customized for the fraternal sector.



## The Dual Mission of Fraternal Benefit Societies

The bar across the top of the framework conveys the need for fraternal organizations to maintain balance between their fraternal activities and their financial management activities. Overweighting one side or the other of this balance beam can lead to gaps in programs to members and their communities (fraternal) or suboptimal returns for members and the organization (financial). An effectively developed strategic plan must keep this balance in mind as new initiatives are developed and implemented.

## The Strategic Triangle

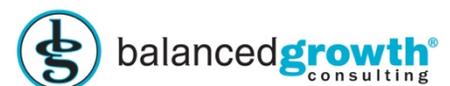
The top three sections of the framework, the strategic triangle, is the critical link between an organization’s strategy (Vision, Mission, Values, SWOT and Strategic Priorities), how it manages the execution of its strategy (Strategic Management System), and how it deploys resources (Resource Allocation) to effectively manage day-to-day operations while investing in strategic initiatives. The integration between the overarching strategy, the operational plan, and the allocation of human, financial and technological resources is both mission and business-critical.

## Functional and Enterprise Levels

To effectively operationalize and execute an organization’s strategy a high degree of dependency exists between the functional and enterprise levels (these will vary by fraternal) depicted in the framework. Because of these interdependencies, both functional and enterprise levels must be aligned to the organization’s strategy and have a commitment to working collaboratively together for the greater good of the organization and its members.

## The Role of Operations and Technology Strategy

Critical to success in today’s market, is the ability to achieve strategic objectives through efficient processes designed with the customer in mind enabled by rapid advancements in technology and the effective use of data. A well-constructed Operations and Technology Strategy may prove beneficial in achieving these goals and helping to prioritize the use of limited financial and human resources.



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