



Understand, plan, do, review (UPDR) – strategic tool



What is the Understand, plan, do, review (UPDR) strategic tool and why is it important?

The Understand, Plan, Do, Review (UPDR) tool is a simple, flexible and practical exercise that can assist you when managing projects and activities. However, don't be fooled by its apparent simplicity - going through the whole process is an insightful and constructive journey for most social enterprises!

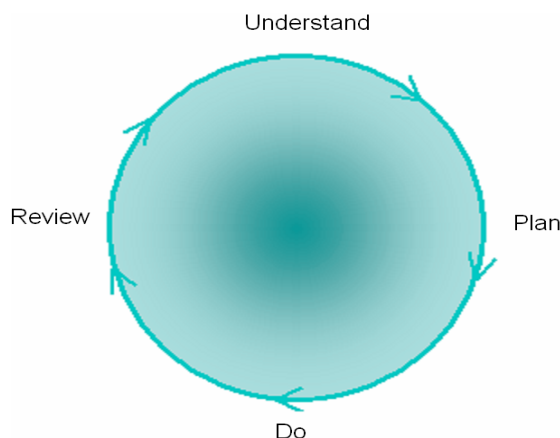
The UPDR tool is not meant to be used for your overall strategy (you can refer to the Balanced Scorecard guide to help you with that) but instead is there to help plan, deliver and evaluate specific initiatives that can be looked at independently.

The UPDR is designed to be used regularly in the lifetime of a project to ensure it's still on track, still achieving its aims, and responding to any necessary changes. For example, you can use it to look at a new mentoring scheme that you have introduced in a public sector organisation, or to review how well one of your workshops is meeting its objectives of making your people more confident during job interviews.

The UPDR tool can be used equally well for a start up enterprise as it can for the continuous improvement and development of a more established organisation. You can use it in conjunction with the 'Who, What, How planning tool' for specific initiatives, but always keep the wider context in mind such as your organisational aims and objectives. This will help you ensure that there is a good fit between your current activities and your overall strategy.

How does the UPDR tool work?

UPDR is a cyclical, step-by-step process with four key phases (see the diagram below). Before applying this tool, make sure that you have reviewed and updated your market research, and that you are familiar with all the main stakeholders involved in your organisation (beneficiaries, customers and key influencers). It will also be a more beneficial exercise if you keep in mind the wider environment within which your organisation operates, such as your competition and the political context affecting your area of work. You can do this by using the SWOT and PESTLE strategic tools (see our guides on strategy for further information on these tools).



The UPDR steps are as follows:

- **Understand** the topic under investigation. For instance, what are the needs of your beneficiary group, or the wider needs in society that you are meeting or attempting to meet? Are you sure these needs

are defined appropriately? How do you know that these needs can be met by your organisation? Have you engaged with your beneficiaries and customers to ensure that you understand these needs well enough?

- **Plan** the activities, services or products you will deliver to address the needs you have identified. Ask yourself whether the way in which you are planning to deliver these is suitable to meet the needs of your beneficiaries and the demands of your customers (if different).
- **Do** - thinking and planning is all well and good, but in order to achieve your goals you must follow through with the delivery of your product or service. Are you already delivering? If not, how can you start? Could you pilot or test your idea?
- **Review** - evaluate the strengths, weaknesses, success or failure of your delivery and look at what you can learn from this experience in order to understand, plan and do better next time.

The aim of the UPDR process is to increase your understanding of how your project meets its objectives and gauge performance on a regular basis so that you can adjust activities (or sometimes terminate them) when they don't deliver as they should. You should carry out this exercise regularly - this could be every week, every month, or every six months, depending on the length, scope and scale of your project.

How to use the UPDR tool

Firstly, define what you want to use this tool for - is it an existing project? A new activity? An initiative you are piloting for a new group of beneficiaries? You can use the Who, What, How strategic tool to help you define this project.

To demonstrate the UPDR tool, we will use an example of a social enterprise delivering advocacy and support services to disadvantaged groups that is looking to expand its services to support older people in the community, a new user group.

Understand

The 'understand' stage might proceed as follows:

- The enterprise would assemble a representative group of stakeholders, including those from the pool of older people it wants to help, and as many people as possible depending upon the availability of time and other logistics.
- Using appropriate tools such as interviews, brainstorming, ideas walls or suggestion boxes, the enterprise would discuss and record issues that this group faces or the needs or problems they might have. Issues might include topics as diverse as the need for affordable tax advice for inheritance tax or access to opportunities for a healthier lifestyle.

Plan

During the planning stage, the social enterprise team would plan and document the services and activities that they think are most appropriate to address the needs they believe exist within their user group. For example, under **access to opportunities for a healthier lifestyle**, activities could include access to local dance classes or cooking workshops for older people.

At this stage, appropriate monitoring measures should be identified and embedded in the delivery plan. Such measures could be a combination of output indicators, which tell you when an activity has taken place (e.g. number of dance classes delivered or number of people attending) and outcome indicators, which tell you about the change that has occurred as a result of an activity (e.g. improved fitness or wellbeing of participants).

Do

The social enterprise would then begin its delivery. This may be a full launch of the service (e.g. a dance programme specifically tailored to older people delivered throughout the borough) or a more controlled pilot project that can be a stepping stone to help prove the idea works (e.g. a three week dance workshop in the local community centre to gauge interest for extending the workshops). The outputs and outcomes of these products or services would then be monitored, either periodically or continuously.

Review

At a predetermined or appropriate time (for instance if only a few older people have visited the dance project in its first weeks), the service and the delivery plan would be reviewed and evaluated, if possible in conjunction with the stakeholders. In this way, problems would be detected.

For example, it might be found that the way the classes were marketed was not appropriate for the target group. Social media such as Facebook or emails may not be an effective medium for publicising an active lifestyle initiative for older people. On the other hand, leaflets or events in libraries, cafes, care homes and GP surgeries might have been more appropriate.

When marketing your projects, remember that your beneficiaries and your customers may not be the same people. Make sure that perspectives other than your own are taken into account when reviewing your projects by engaging with as wide a stakeholder range as possible to develop your understanding and review your results. Also keep track of your organisation's overall aims, and ensure that these activities fall within that.

Finally, take this additional learning back into the first stage (understanding) of the process, and go through it again.

Example of using UPDR

Variations on this process are used extensively by public sector commissioners to plan the commissioning and decommissioning of public services. If you are delivering or intending to deliver services to the public sector (health care, advice and guidance or training, for example), using a thorough 'Understand, Plan, Do, Review' process will increase your chances of successfully engaging with public sector commissioners.

For example, the Commissioning Support Programme (www.commissioningsupport.co.uk) is sponsored by the Department for Children, Schools and Families and the Department of Health to help Children's Trusts plan, design and implement services more effectively. It uses this framework to explain the basic characteristics of effective commissioning:

'The basic stages in the commissioning process can be summarised as:

Understand – understand needs, resources and priorities and agree outcomes

Plan – map and plan sustainable and diverse services to deliver outcomes

Do – procure and develop services based on the plan

Review – monitor service delivery of outcomes and take remedial action if necessary.

All four of these stages are equally important, and should be transparent, with ongoing consultation and engagement with key stakeholders including providers and children, young people and families.'

Further information

Read our guide on **Setting your aims and objectives:**

www.blondon.com/SocialEnterprise/SettingUp/Settingobjectives/Settingaimsandobjectives.aspx

Read our guides on **Market Research:**

www.blondon.com/SocialEnterprise/Marketing/Salesandmarketing/Marketresearch.aspx

Read our guide on **Identifying your stakeholders:**

www.blondon.com/SocialEnterprise/SettingUp/Firststeps/Identifyingyourstakeholders.aspx

Read our guide on **Customers, beneficiaries and key influencers:**

www.blondon.com/SocialEnterprise/SettingUp/Firststeps/Customersbeneficiariesandkeyinfluencers.aspx

Read our guides on **Strategy:**

www.blondon.com/SocialEnterprise/Strategy/SEstrategy.aspx