

# SMART Recovery International 2022 Strategic Springboard

Prepared for



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# Overview

SMART Recovery International (SRI) is a global organisation working to enable national SMART Affiliate organisations in their mission to help program participants overcome the life challenges caused by addiction.

SRI was formed in 2018 with an initial strategic plan to support SMART Affiliates worldwide in consistent delivery of the program, develop foundational communication infrastructure to support operations, drive the growth and development of the SMART community worldwide, and lead the ongoing development of research and science behind the SMART Recovery program.

Today, SRI faces a number of key challenges:

- Limited access to funding;
- A strong brand recognised by peers but not significantly beyond this;
- A unique environment to deliver the program in each geography; and
- A stakeholder group that is complex and will become increasingly so as more Affiliates are established and reach sufficient scale for direct representation on the SRI Board.

To address these challenges, SRI engaged Snowmelt to assist in the development and articulation of its strategy for the next three years.

Snowmelt and the SRI Strategy Working Group (Kim McCreanor, Jennifer Johannesen and Lorena Di Carlo) undertook a series of exercises to map the global SMART Recovery Community and its operating environment. This was used as the basis for wider strategic conversations and ultimately to frame a workshop with current and incoming members of the SRI Board to discuss how SRI might realise its strategic intent.

This document outlines the outputs of these activities - the **Strategic Intent** for SRI and initial notes on **Implementation** for key initiatives.

Snowmelt would like to all workshop participants for their energy and ideas for the SRI strategy:

- Scott Beachley (SMART Australia)
- Lorena Di Carlo (SRI)
- Bill Greer (SMART USA)
- Jennifer Johannesen (SRI)
- Kim McCreanor (SRI)
- Brett Macdonald (SRI)
- Ryan McGlauglin (SMART Australia)
- Darren O'Brien (SMART Ireland)
- Charlie Orton (UK SMART)
- Mark Ruth (SMART USA)
- Brett Sareela (SMART USA)
- Shiv Sharma (UK SMART)
- Tony Wales (SMART Australia)

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01

# Strategic Intent



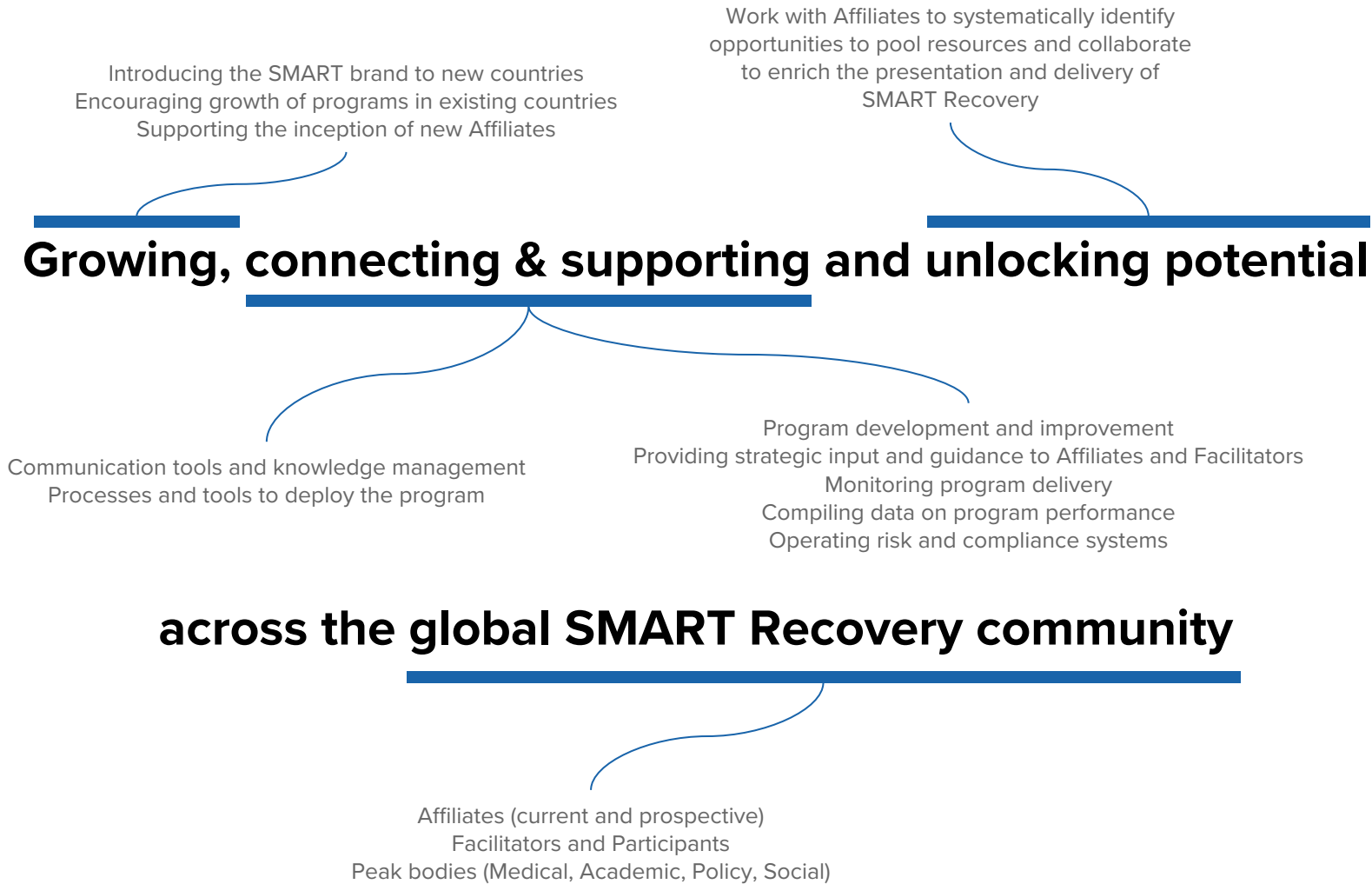
## Design principles

Developing and implementing a strategy for a complex organisation like SRI requires careful consideration of many different priorities and agendas in a dynamic stakeholder environment.

It is difficult to set defined, quantitative criteria to resolve these tensions upfront, but it is possible to capture the qualitative rationale for undertaking a strategic development process - essentially, answering the question of “*Why do we need a strategy?*”.

This rationale can be used to check and ensure that the decisions being taken in developing and implementing the strategy are helping (rather than hindering) the organisation’s progress. When codified, the rationale takes the form of design principles.

The design principles identified by the strategy working group and wider SRI Board are pictured, and should be used to shape and iterate downstream strategic initiatives.



## The SRI Strategy

An organisation’s strategic intent is its reason for being - it articulates and codifies the purpose of the organisation. This is in turn used to develop a strategy that can be implemented, and guides decision making over time.

The strategic intent for SMART Recovery International has been set: *growing, connecting, supporting and unlocking potential across the global SMART Recovery community.*

The SRI 2022 Strategy derives directly from this strategic intent. It has three domains of activity:

- **Growing;**
- **Connecting & supporting;** and
- **Unlocking potential**

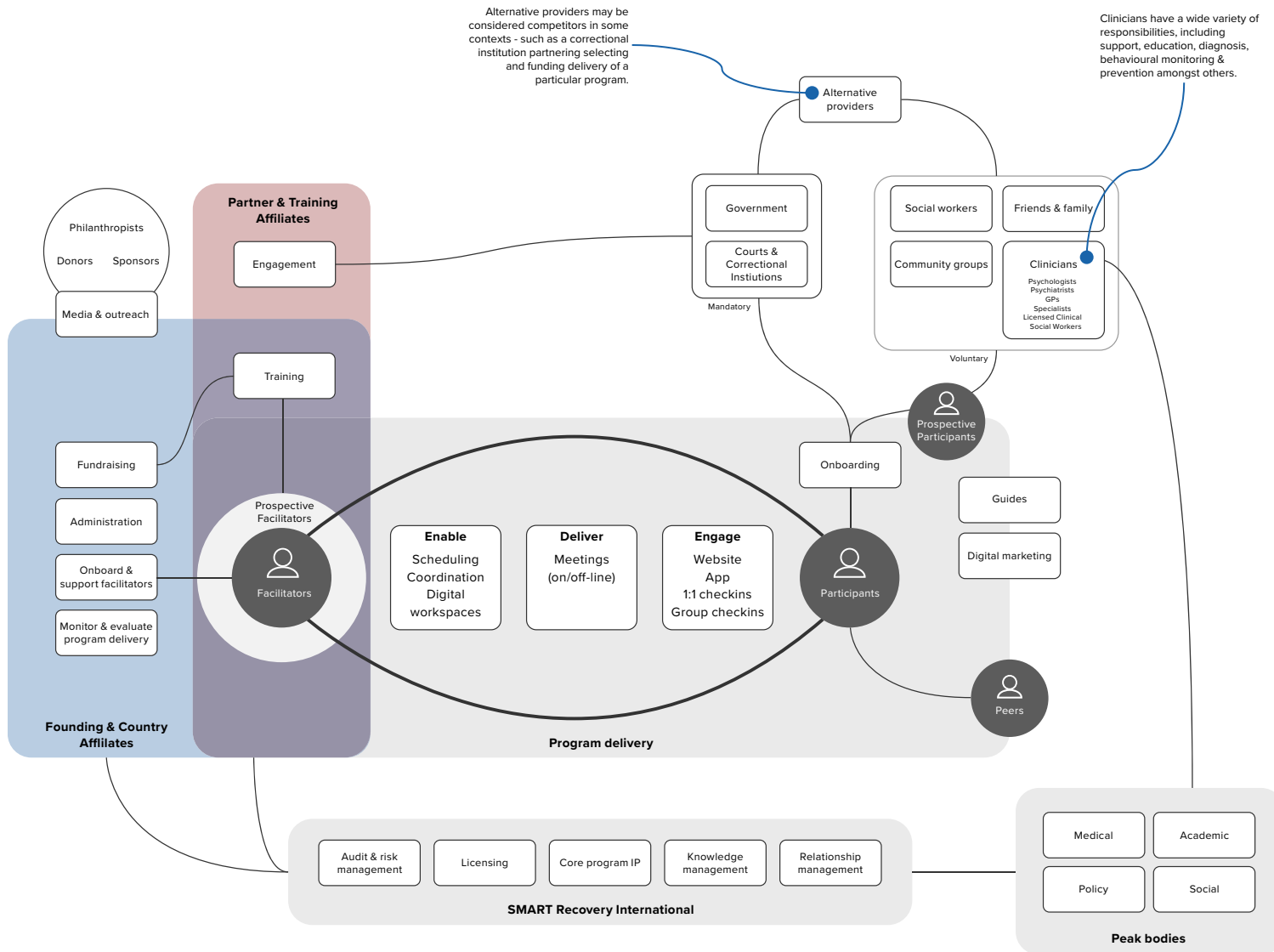
across the global SMART Recovery community.

The substantive purpose of each domain is pictured. As SRI continues to mature and core infrastructure is in place, the focus of activity will continue to evolve from connecting & supporting Affiliates to growing and unlocking potential.

This shift is critical to ensure the financial stability of SRI - increasing the number and scale of Affiliates increases established licence/publication revenue streams, and new initiatives give SRI the chance to capture a share of the value being created across the system.

02

# Strategic Implementation



## Understanding the global SMART Recovery community

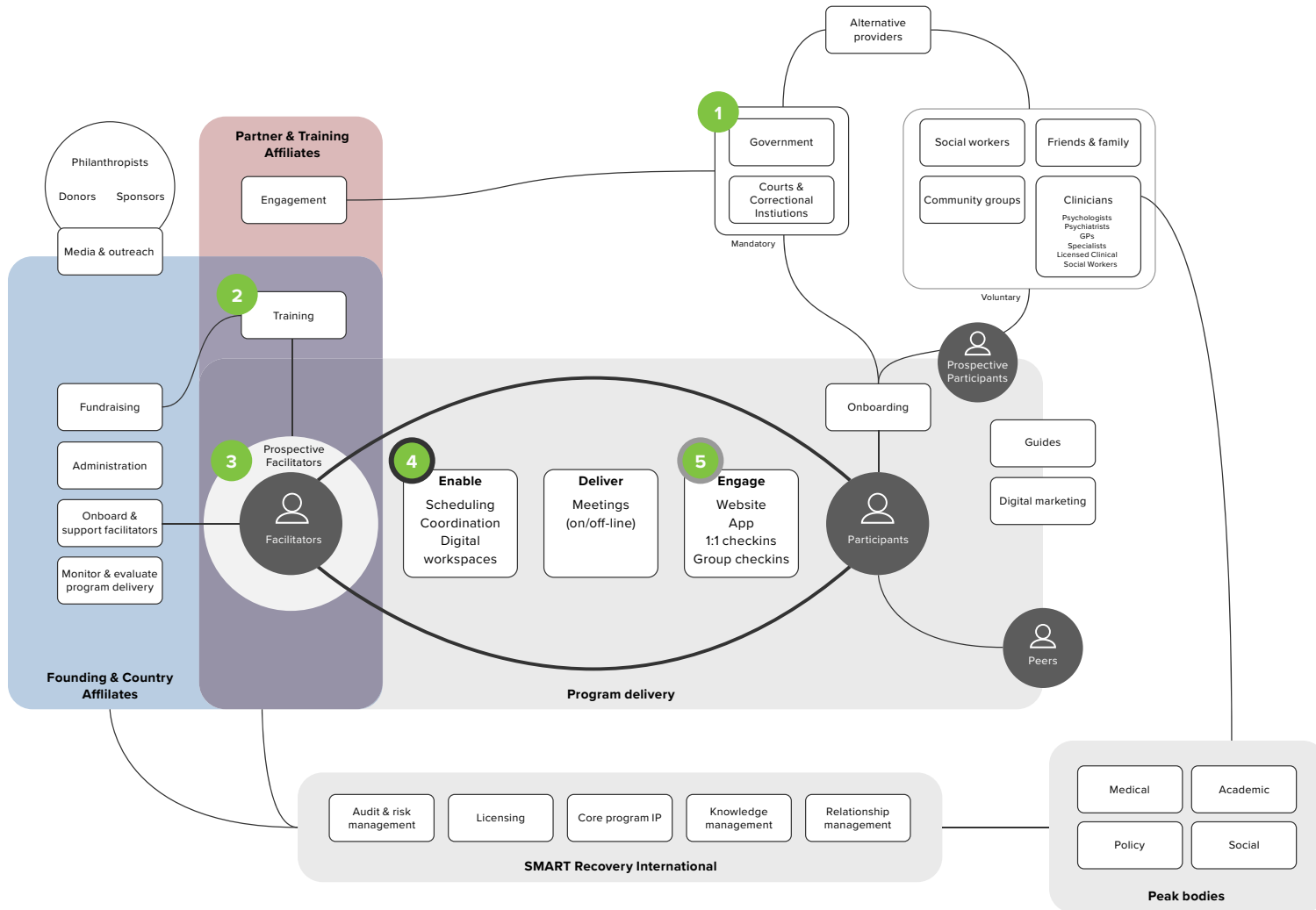
To effectively focus on *growing, connecting, supporting and unlocking potential across the global SMART Recovery community*, it is necessary to understand it.

The pictured SMART Recovery system map of is focused on how the SMART Recovery community comes together to make a difference and create value in the world - when the SMART Recovery program is *delivered by facilitators to support participants*. Affiliates (and selected activities) are positioned around the core program delivery, as are key stakeholders/motivators for participants.

Systems are complex and interconnected. This map is not intended to be comprehensive - rather, it has been developed to show the most significant entities, activities and relationships that impact the delivery of the SMART Recovery program that SRI might seek to understand and influence.

To determine how to best implement the strategy, the SRI Board engaged in an ideation workshop to identify opportunities for SRI to further its purpose, drawing from their work as part of SRI and their experience from within their substantive affiliates.

The key initiatives identified in this workshop are outlined in the following pages. In implementing these initiatives, SRI must be sensitive to organisational constraints and its operating environment; and work to maximise its impact by focusing resources on initiatives benefiting all Affiliates.



## Key initiatives: Grow

Growing the global SMART recovery community is focused on:

- Introducing the SMART brand to new countries
- Encouraging growth of programs in existing countries
- Supporting the inception of new Affiliates

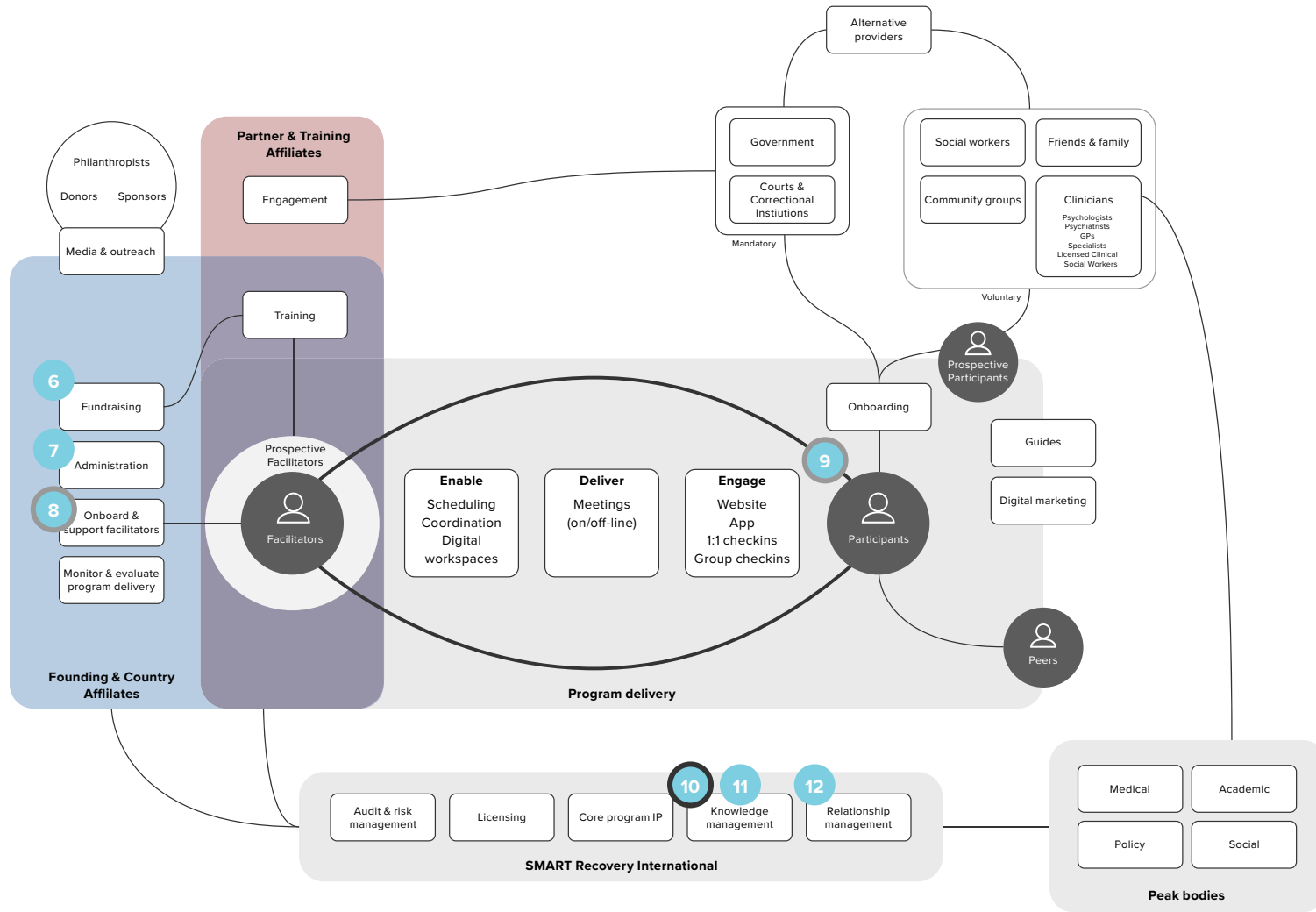
This ambition relies on a conducive cultural and policy setting for successful country entry, the engagement, training and retention of Facilitators and the tools to scale delivery of the program.

Key initiatives identified by the SRI board include:

- 1. Monitoring global drug policy changes** and presenting SMART when conditions are favourable.
- 2. Translating and packaging training material** to increase availability and accessibility.
- 3. Transition participants to facilitators**, leveraging knowledge and experience to create the best experience for future participants
- 4. Standardise and scale digital meeting infrastructure** to reduce costs and create a consistent experience.
- 5. Standardise and scale participant tools** to reduce cost and improve features available (e.g., single global SMART companion app).

Key	
○	Priority
●	Top priority





## Key initiatives: Connect & support

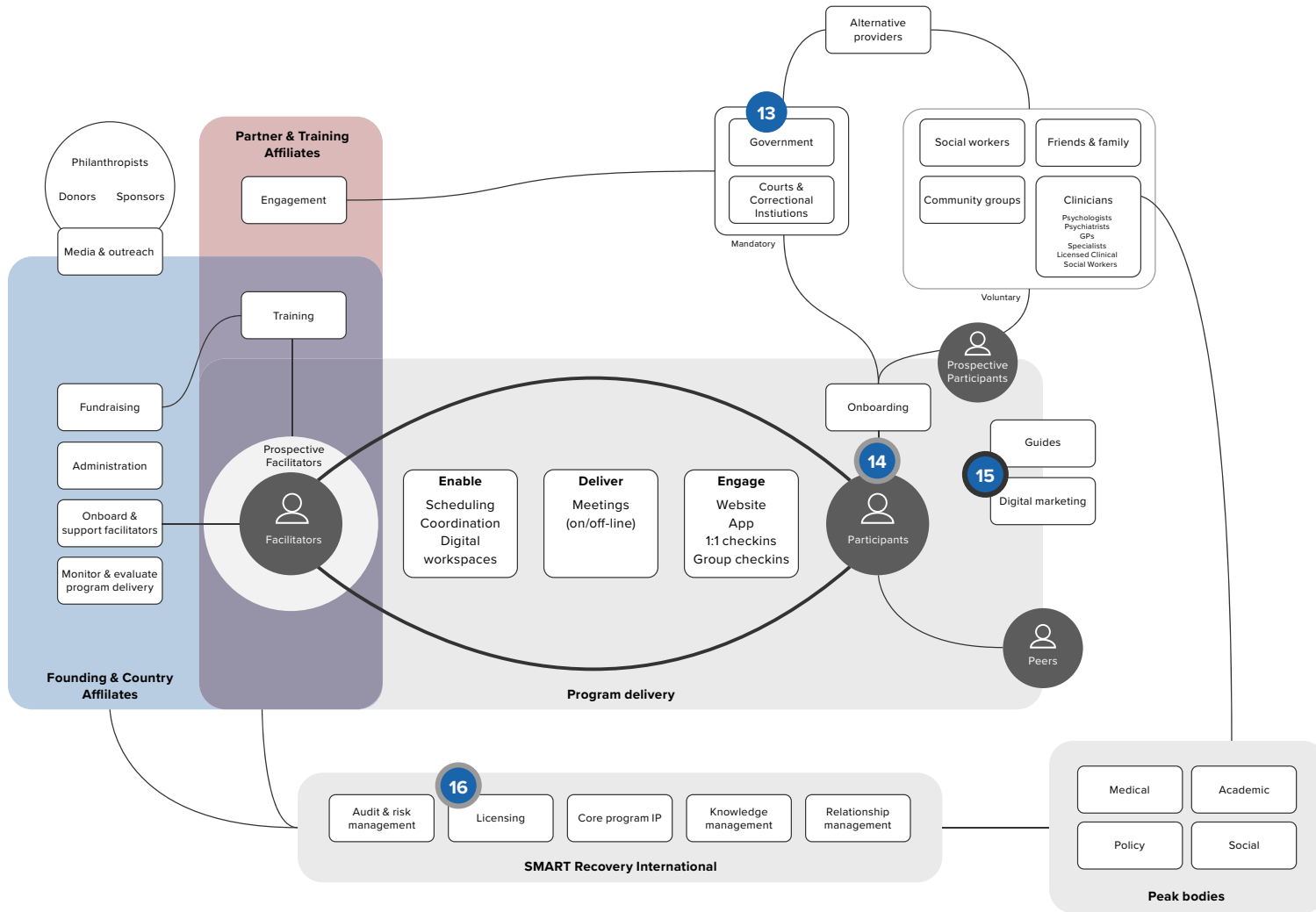
Connecting & supporting the global SMART recovery community is focused on:

- Communication tools and knowledge management
- Processes and tools to deploy the program
- Program development and improvement
- Providing strategic input and guidance to Affiliates and Facilitators
- Monitoring program delivery
- Compiling data on program performance
- Operating risk and compliance systems

This ambition relies on a clear to delivery of the SMART Recovery program and a willingness for all Affiliates to align and work as consistently as practicable.

Key initiatives identified by the SRI board include:

- 6. Scale SRI communication** so that Affiliates are better informed of the strategy and activities of SRI, and have the opportunity to offer support. Includes new digital tools (e.g., Slack, Trello).
- 7. Collate data on participant outcomes** to better articulate the value of the program.
- 8. Improve facilitator support** with consolidated resources and connection with peers.
- 9. Develop consistent communications** that draw from global cases.
- 10. Establish communities of practice** across Affiliates to share knowledge and experience.
- 11. Build a library of packaged material** that makes research on the program easy to navigate and use in all contexts.
- 12. Run a global SMART Recovery conference** to connect the SRI Board and community.



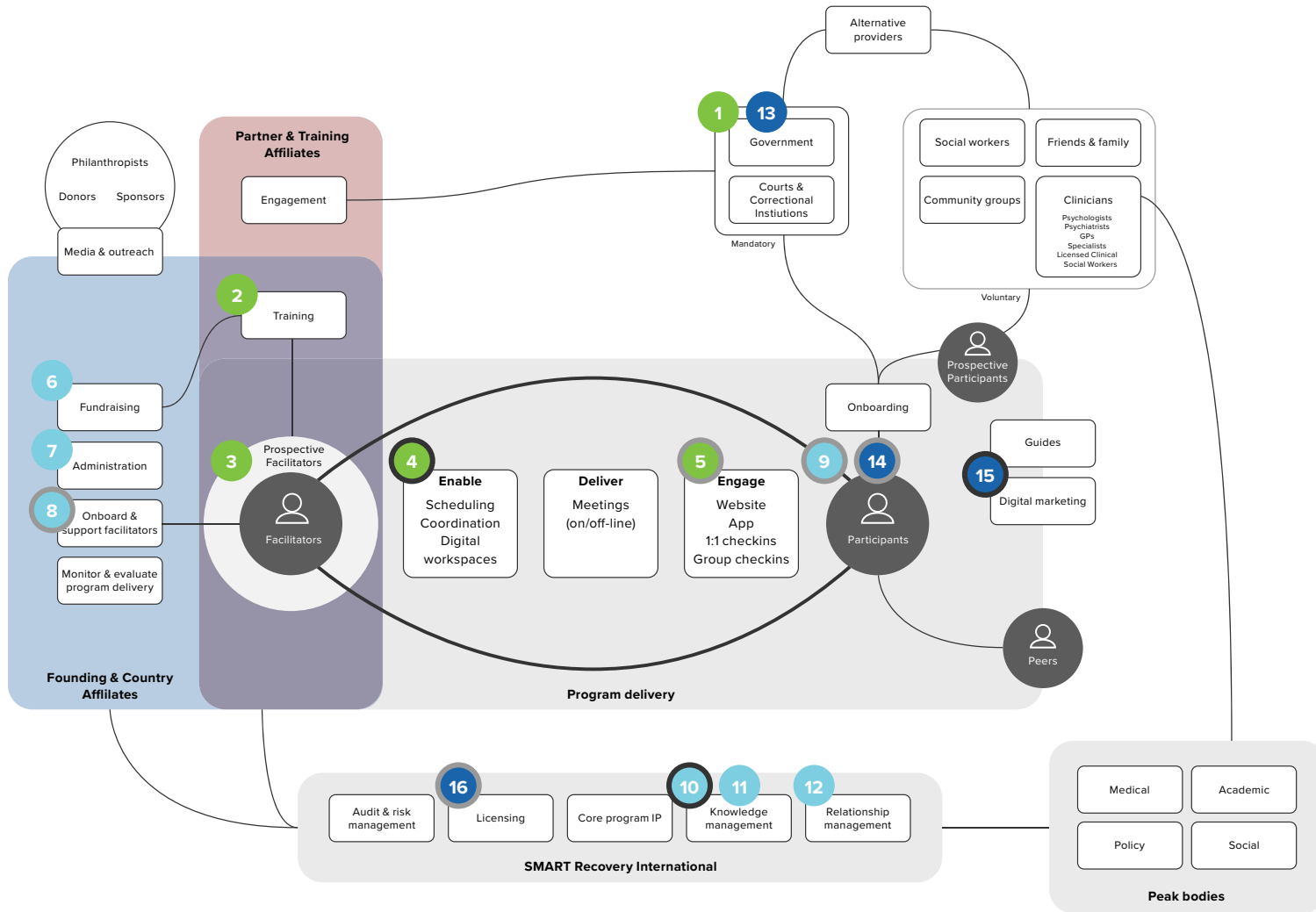
Key	
○	Priority
●	Top priority

## Key initiatives: Unlock potential

Unlocking potential across the global SMART recovery community is focused on working with Affiliates to systematically identify opportunities to pool resources and collaborate to enrich the presentation and delivery of SMART Recovery.

A number of collaborative initiatives between Affiliates have already emerged organically (e.g., Digital fundraising campaigns and the imminent use of the SMART Track app in other countries). A systematic approach to identifying these opportunities help all Affiliates multiply their impact and create potential new revenue opportunities for SRI.

- 13. Influencing global drug policy changes** to create the conditions to introduce SMART and support a wider participant audience (e.g., ongoing clinical research and communication thereof)
- 14. Map participant journeys** to understand leverage points and interactions to maximise engagement and retention.
- 15. Develop a digital and social media strategy** to propel the brand into the mainstream.
- 16. Develop a progressive funding model** for SRI that incentivises Affiliates to invest collectively & flexibly and builds the overall IP and assets of SRI for use by all Affiliates.



Key	
○	Priority
●	Top priority

## In full

Taken together, these initiatives represent a mode of implementation for the SRI strategy. It is apparent that the identified initiatives are those that have benefits for all Affiliates. The SRI Board has identified top priority and priority initiatives within each domain - these are the focus for SRI with its limited resources. The diverse nature of these initiatives will require SRI, its committees and Affiliates to collaborate and in some cases co-invest to complete and realise value.

### Grow initiatives

1. Monitoring global drug policy changes
2. Translating and packaging training material
3. Transition participants to facilitators
4. Standardise and scale digital meeting infrastructure - top priority
5. Standardise and scale participant tools - priority

### Connect & support initiatives

6. Develop consistent communications
7. Establish communities of practice
8. Improve facilitator support - priority
9. Collate data on participant outcomes - priority
10. Scale SRI communication - top priority
11. Build a library of packaged material
12. Run a global SMART Recovery conference

### Unlock potential initiatives

13. Influencing global drug policy changes
14. Map participant journeys - priority
15. Develop a digital and social media strategy - top priority
16. Develop a progressive funding model - priority



## Relative prioritisation

The SRI Board has mapped the relative impact and effort of each initiative as currently understood.

This can be referenced to help make future prioritisation decisions in context of SRI's resource constraints and the priorities of Affiliates who will be offering support.

### Grow initiatives

1. Monitoring global drug policy changes
2. Translating and packaging training material
3. Transition participants to facilitators
4. Standardise and scale digital meeting infrastructure - top priority
5. Standardise and scale participant tools - priority

### Connect & support initiatives

6. Develop consistent communications
7. Establish communities of practice
8. Improve facilitator support - priority
9. Collate data on participant outcomes - priority
10. Scale SRI communication - top priority
11. Build a library of packaged material
12. Run a global SMART Recovery conference

### Unlock potential initiatives

13. Influencing global drug policy changes
14. Map participant journeys - priority
15. Develop a digital and social media strategy - top priority
16. Develop a progressive funding model - priority

Key	
○	Priority
●	Top priority

03

# Initiative Snapshots

These initiatives as outlined are nascent, and should be treated as a starting point for conversation and implementation.

The role of SRI should be deliberately set when beginning work. Consider the scope of the initiative, and what it will lead to - in particular, what it will enable each Affiliate to pursue.

# Initiative snapshots: **Grow**

1

## Monitoring global drug policy changes

Present SMART in regions when conditions are favourable; taking advantage of public and private sector interest in new methods that connect with government policy.

**Ambition:** Position SMART to rapidly enter new markets and be the leading addiction recovery provider within them.

### Initial activities

- Identify regions with known addiction issues that will attract government attention (e.g., eastern European countries)
- Monitor global drug policy and discourse
- Market analysis and sizing to identify potential Partner & Training Affiliates to bootstrap Facilitator cohorts

### Possible evolution

- Direct engagement with Facilitators to support inception of new Country Affiliates

**Delivery mechanism:** Core SRI activity through Global Research Advisory Committee and Global Training Committee.

**Key stakeholders and Affiliates:** SRI, Affiliates that are culturally and linguistically similar to those with emerging addiction challenges.

2

## Translating and packaging training material

Increase availability and accessibility; making material available in more languages and through more channels.

**Ambition:** Any individual interested in becoming a facilitator can do so - they can understand and engage with the manual and program material.

### Initial activities

- Gap analysis of current language coverage and anticipated future demand
- Assess feasibility of automated translation tools (e.g., Google Translate) to rapidly increase accessibility
- Assess desirability of new delivery channels for new markets (e.g., offline training where online infrastructure is less developed (Africa))

### Possible evolution

- If appropriate, SRI or Affiliates to scale development of training material and delivery of training globally

**Delivery mechanism:** Core SRI activity through Global Training Committee.

**Key stakeholders and Affiliates:** SRI, Training Affiliates.

3

## Transition participants to facilitators

Leveraging knowledge and experience to create the best experience for future participants; deliberately tracking and progressing relationships with capable participants and exploring new facilitator models (e.g., co-facilitation or support facilitation) to make the transition less intimidating.

**Ambition:** SMART Affiliates are able to scale to meet anticipated post-pandemic demand, growing to deliver 10,000+ meetings per week.

### Initial activities

- Identify a CRM or equivalent to track participants - NFP pricing critical due to scale
- Analyse of outreach activities undertaken by Country Affiliates, documentation and dissemination of best practice
- Analyse facilitation models (e.g., co-facilitation, support facilitation) to lower barriers to entry for new facilitators, documentation and dissemination to Country Affiliates
- SRI or relevant Country Affiliate to engage independent facilitators and ultimately move towards incorporating a new Affiliate

### Possible evolution

- Extend scope of program to include facilitation and community support as end state

**Delivery mechanism:** Core SRI activity through Global Training Committee.

**Key stakeholders and Affiliates:** SRI, Founding Affiliates operating at scale requiring capacity.

# Initiative snapshots: **Grow**

4

## Standardise and scale digital meeting infrastructure

Reduce costs and create a consistent experience; ensuring that the program is accessible to participants that cannot attend physical meetings due to lockdowns or other restrictions.

**Ambition:** Streamline virtual program and meeting delivery by giving Facilitators and Participants the tools they need to connect consistently.

### Initial activities

- Establish a cross-Affiliate working group to share knowledge and minimise rework. The focus of this group might include:
  - Identify immediate requirements and plan to meet them
  - In parallel, develop longer-term strategy that meets the needs of current and potential Affiliates
  - Determine whether immediate solutions will be a part of the long-term strategy and invest accordingly
  - Finding partnerships with digital service providers positioned to meet these needs - NFP pricing or sponsorship critical due to scale

### Possible evolution

- Bring core technology capability in-house
- Extend functionality into other backend infrastructure (e.g., Facilitator gamification and support tools)

**Delivery mechanism:** Core SRI activity through new Digital Transformation Committee.

**Key stakeholders and Affiliates:** SRI, Founding Affiliates operating at scale requiring capacity.

5

## Standardise and scale participant tools

Reduce cost and improve features available (e.g., single global SMART companion app); increasing engagement across, boosting (and collecting data on) the overall performance of the program.

**Ambition:** A single app available globally that meets the needs of participants and Affiliates.

### Initial activities

- Continue development of Australian SMART Track app, including deployment to UK SMART and SMART Ireland
- Document system requirements for other Affiliates and establish a feature backlog
- Build a development and support model (financing and capability) for the app

### Possible evolution

- Use data on engagement to support other initiatives (e.g., collating data on participant outcomes, influencing drug policy)
- App creates a platform to engage participants beyond the program and increase their connection with SMART

**Delivery mechanism:** Core SRI activity through new Digital Transformation Committee.

**Key stakeholders and Affiliates:** SRI, SMART Australia, UK SMART, SMART USA, SMART Ireland

# Initiative snapshots: Connect & support

6

## Develop consistent communications

Draw from global cases; creating a rich picture that helps donors, philanthropists and sponsors understand the SMART story, its impact and how they can help.

**Ambition:** Affiliates can fundraise to support their activities efficiently and effectively, focusing their time on engagement and relationship building.

### Initial activities

- Audit existing fundraising activities and messaging - identify patterns with maximum potential for case studies and storytelling
- Develop appropriate narrative and storytelling archetypes and communication models
- Select digital tools to manage and coordinate SRI activities and communications (e.g., Asana)
- Build templates for refined case studies
- Engage with affiliates to identify their best case studies to contribute or develop

### Possible evolution

- Automate fundraising and campaign activities in line with good-practice and Affiliate learning

**Delivery mechanism:** Core SRI activity through Global Brand & Communications Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates, prospective Country Affiliates

7

## Establish communities of practice

Share knowledge and experience; creating learning conversations between teams doing similar work that are currently unconnected and solving the same problems for the first time.

**Ambition:** The global community solves each problem once only, and has access to the knowledge and capabilities of the whole.

### Initial activities

- Review existing Facilitator community of practice model, identify learnings/opportunities
- Develop a pattern for communities of practice within the global community
- Identify candidate communities that might benefit from communities of practice (e.g., capabilities duplicated across Affiliates)
- Identify thought leaders within each community and Affiliate and connect them to establish the community

### Possible evolution

- Capacity becomes shared across communities of practice, helping Affiliates grow rapidly

**Delivery mechanism:** Core SRI activity through Global Training Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates

8

## Improve facilitator support

Consolidate resources and connection with peers; increasing facilitator performance and retention.

**Ambition:** Facilitator capacity and satisfaction increases, SMART is seen as a desirable program to support.

### Initial activities

- Segment and interview past, present and prospective facilitators to understand their experience, pleasures and pains
- Identify opportunities for Affiliates to amplify pleasures and mitigate pains
- Develop content, collateral and tools to streamline the facilitator experience and position them to spend their time with participants rather than on administration
- Test delivery methods across regions
- Identify mentoring and backup opportunities to reduce the load on individual facilitators

### Possible evolution

- Direct engagement with Facilitators to support inception of new Country Affiliates

**Delivery mechanism:** Core SRI activity through Global Training Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates, prospective Country Affiliates

9

## Collate data on participant outcomes

Better articulate the value of the program in all contexts; highlighting the efficacy of the SMART program at scale.

**Ambition:** SMART has the largest documented evidence base of all addiction recovery programs.

### Initial activities

- Global Research Advisory Committee to identify gaps/weaknesses in evidence base
- Identify opportunities to collect data from participants without disrupting the program
- Ensure medical, ethical and privacy requirements can be satisfied
- Pilot approach to collect impactful information to improve the evidence base
- Document research findings comprehensively

### Possible evolution

- Engage with participants at a regular cadence through the SMART Track app
- Clear processes and outcomes for new Affiliates to track and measure against

**Delivery mechanism:** Core SRI activity through Global Research Advisory Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates, prospective Country Affiliates peak bodies



# Initiative snapshots: Connect & support

10

## Scale SRI communication

Affiliates are better informed of the strategy and activities of SRI, and have the opportunity to offer support. Includes new digital tools (e.g., Slack, Trello); increasing visibility of and engagement between Affiliates and SRI.

**Ambition:** Affiliates have a shared and consistent understanding of SRI's activities and purpose.

### Initial activities

- Engage with Affiliates to understand primary modes of communication and information sharing
- Develop a communications strategy to scale SRI communications with Affiliates and beyond
- Build prototypes to test and experiment with formats

### Possible evolution

- Iterate the approach based on tracked engagement and qualitative feedback

**Delivery mechanism:** Core SRI activity through Global Brand & Communications Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates, prospective Country Affiliates

11

## Build a library of packaged material

Make research on the program easy to navigate and use in all contexts; so that Affiliates can engage with their stakeholders in a timely and effective manner.

**Ambition:** Affiliates have immediate access to packaged research, case studies and collateral built from collective activity across the Community.

### Initial activities

- Establish communication channels between Affiliates to ensure visibility of research and case study development
- Develop use cases, engagement model and design principles for a material library
- Adopt a knowledge management system to store and browse the material library
- Create a pilot with the highest utility information, monitor and evaluate performance

### Possible evolution

- Transition existing materials into the library

**Delivery mechanism:** Core SRI activity through Global Brand & Communications Committee and Global Research Advisory Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates, prospective Country Affiliates

12

## Run a global SMART Recovery conference

Connect the SRI Board and community; building deeper relationships so that the global SMART Recovery community as a whole can work as efficiently and effectively as possible.

**Ambition:** The global SMART Recovery community is tightly aligned on vision and mission and has a clear sense of the activities being undertaken by each affiliate.

### Initial activities

- Identify audience for the conference (SRI, Global Research Advisory Committee, others)
- Develop preliminary agenda and activities
- Identify and tender possible locations
- Identify and engage possible guest speakers

### Possible evolution

- Progress conferences from an ad-hoc to regularly scheduled activities

**Delivery mechanism:** Core SRI activity through Global Brand & Communications Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates, prospective Country Affiliates

# Initiative snapshots: **Unlock potential**

13

## Influencing global drug policy changes

Create the conditions to introduce SMART and support a wider participant audience (e.g., ongoing clinical research and communication thereof); by creating a clear catalyst for government action.

**Ambition:** A global shift in perspective on drug policy frameworks; from prohibition and control to policies that support health and development and do not undermine human rights.

### Initial activities

- Identify and engage with key policy influencers in areas with traditional perspectives on addiction and substance use
- Understand assessment and decision making approaches in this context
- Collect and frame information on the SMART Recovery program as a valuable, evidence & research based solution

### Possible evolution

- Proactive engagement and partnership with academic and research communities

**Delivery mechanism:** Core SRI activity through Global Research Advisory Committee

**Key stakeholders and Affiliates:** SRI, Founding Affiliates and independent Facilitators

14

## Map participant journeys

Understand leverage points and interactions to maximise engagement and retention; identifying areas of common need across geographies for shared investigation and investment.

**Ambition:** Use a shared understanding of the participant experience of recovery, including their interactions with SMART, to shape and guide future investment.

### Initial activities

- Identify source of service design capability (within an Affiliate or externally)
- Map participant journeys to understand their experience of recovery holistically (feelings, actions, experiences, needs, opportunities)
- Gap analysis to determine where SMART Affiliates can better support participants in their recovery journey
- Selection and development of interventions

### Possible evolution

- Extension of SMART activity to other aspects of participant experience with addiction

**Delivery mechanism:** Core SRI activity through new Participant Insight Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates

15

## Develop a digital and social media strategy

Propel the brand into the mainstream; making it known to those outside the addiction recovery space.

**Ambition:** A strong and consistent digital brand presence across the countries SMART operates in and beyond.

### Initial activities

- Ongoing review of SRI and Affiliate social media accounts to ensure brand is represented consistently
- Understand needs of users (Participants, Facilitators, Donors, Sponsors)
- Audit of SRI and Affiliate websites to build superset of features, content and technologies
- Assess feasibility of website consolidation or otherwise streamlined approach to management

### Possible evolution

- Single digital platform for all Founding & Country Affiliates

**Delivery mechanism:** Core SRI activity through Global Brand & Communications Committee and Digital Transformation Committee

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates

16

## Develop a progressive funding model

Incentivise Affiliates to invest collectively & flexibly and builds the overall IP and assets of SRI for use by all Affiliates; ensuring the sustainability of SRI and positioning it to deliver on its strategic intent.

**Ambition:** SRI is sustainably financed by Affiliates, who have access to more and greater tools than they could individually.

### Initial activities

- Understand fixed and flexible financing dynamics for all Founding & Country Affiliates
- Develop design principles for future SRI funding model
- Discuss and develop future funding models, including those that have already been used (e.g., Take on Addiction campaign), move to implement as soon as practicable

### Possible evolution

- Move to a project co-funding model where Affiliates jointly invest in SRI developing new IP/ capability to be licensed back to them, receiving a discount on this based on initial investment

**Delivery mechanism:** Core SRI activity

**Key stakeholders and Affiliates:** SRI, Founding & Country Affiliates

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