

## ***Our Approach to Strategy***

### ***Opening a clear path to the future you intend to own.***

Building an effective strategy requires a process that engages stakeholders and considers alternative ways of achieving longer-term goals.

Our approach has been refined over 30 years and hundreds of projects. We know that plans fail when goals and initiatives are overly ambitious. In guiding your team through the strategic planning wilderness, we make sure that everything in your plan is clear and focused on moving your organization from where it is today to where you intend it to be in the future.

Our approach to facilitated strategic planning has five distinct and interrelated ingredients: **PREPARATION, INVESTIGATION, CONVERSATION, FORMULATION, and EXECUTION.**



We offer this as an end-to-end process.

### ***PREPARATION***

Preparation involves establishing a framework for the entire assignment and ensuring that all participants are aware of, and in agreement with, their required roles, the overall planning process and the way it is about to unfold, and what will be expected of their staff in terms of time and effort.



We review information that will add to our understanding of our client's organization and the issues that should be factored into the planning process and create a detailed workback schedule that outlines what will be done, when and by whom.

A key aspect of preparation, broken out separately due to its Importance, is **Investigation** or research that ensures the planning process takes account of any and all actors likely to affect the organization's longer-term success, and enables us to identify and frame the **key issues** to be addressed by the leader team.

Once this preparatory work has been completed, we:

- craft an **agenda** for the subsequent retreat that revolves around a set of questions designed to elicit the required dialogue and decisions; and
- prepare a **briefing package** that distills important information and insights and confirms the outcomes established for the project.

## **INVESTIGATION**

In our role as **information/data gatherer**, our goal is to generate insights that will be useful in identifying the opportunities and challenges that should be considered.



Our expertise lies in:

- designing and conducting **key informant interviews** with clients, customers, members, and employees to gain a broad perspective on the opportunities and challenges facing the organization;
- conducting **surveys** to identify, confirm, and flesh out opportunities and challenges, and provide relevant contextual material for the strategic dialogue;
- forming **working groups** to brainstorm and flesh out concepts and issues that should be factored into the strategy process;
- designing and moderating **focus groups** to provide feedback on preliminary conclusions around critical issues; and
- undertaking **online research** to isolate relevant information on competitors and comparators as well as the business environment.

There is value in having people experienced in information gathering undertake this work as experience provides an understanding of what information to acquire and how to do so.

By way of example, prior to conducting personal interviews we develop a discussion guide of open-ended questions as opposed to a structured questionnaire. While some structure is necessary to ensure that an interview program delivers specific and relevant information, we have found that flexibility and real insights go hand in hand. Having the ability and the experience to pick up on a respondent's comments and pursue a line of questioning that was not originally foreseen often produces information of exceptional value – information that would have remained buried had we kept to a highly structured questionnaire.

Once gathered, we summarize the information for the briefing note referred to above in the Preparation phase, highlighting trends and other key insights.

## CONVERSATION

Structuring and facilitating an inclusive and productive dialogue is an essential part of our facilitated planning process.

As facilitators, our role is to draw out and record the knowledge, wisdom, and insight of those involved in the strategic dialogue, help them synthesize that knowledge into a rational set of conclusions and decisions, and provide an environment in which key stakeholders can take ownership of and commit to the strategic choices they have made.

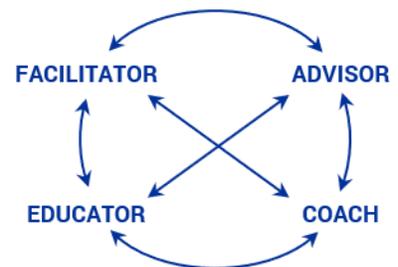


Normally, our work includes:

- introducing the agenda and rules of engagement;
- facilitating the session, prepared to assume any and all of the four roles outlined below;
- managing the pace and ensuring that all participants actively contribute;
- adjusting the agenda in flight as required;
- driving each stage in the session to *definitive* conclusions;
- documenting the results on flip charts or whiteboards, using mind mapping and other aids; and
- wrapping up the session with an agreed-upon 90-day *Action Agenda* that gets implementation off to a fast start.

During this conversation, we will dynamically move across a spectrum of four roles, depending on what we sense is required in the moment to ensure the conversation is complete, creative, respectful, and productive.

These four roles are **facilitator** of the meeting process, **educator** of frameworks that will support the dialogue, **advisor** to challenge the efficacy of chosen directions, and **coach** of the team to enhance the interaction of team members.



## FORMULATION

We distill and synthesize the results of the facilitated dialogue into a concise narrative that clearly presents the strategic direction of the organization.



This document, once it has been reviewed, edited, and confirmed by the members of the leadership team sets out strategic priorities, outlines the rationale underlying decisions to pursue these priorities, and describes the way each will be dealt with in the period covered by the strategic plan.

## EXECUTION

In most cases, the facilitated sessions will conclude with participants building an *Action Agenda* that launches implementation and results in some early wins. In our experience, early wins are essential to ensure those charged with doing the work believe that leadership is serious about the plan and that the time they are being asked to invest is necessary.



We normally focus the *Action Agenda* on “the next 90 days” to ensure that members of the group see progress immediately following the session. Another reason for the 90-day Action Agenda, is that our experience shows us that there is little point in mapping out the next year or more in any detail as it will look overwhelming and things will change requiring adjustments either to the plan or to the implementation. We also suggest spending some time before closing the session on how to keep the dialogue going, e.g., through monthly “strategy-oriented” meetings to review and revise the agenda, as well as half-day quarterly sessions to review progress.

In this phase, our role as an engaged third-party is to act as a sounding board and dispassionate source of ideas, techniques, and tools to support implementation. This can involve:

- checking in with the executive sponsor on a regular (monthly) basis to address any questions or challenges that have emerged;
- more formally acting as a leadership coach for the executive sponsor, and team coach for the leadership team; and
- facilitating quarterly learning reviews of the strategic priorities and strategic initiatives.

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*If you are interested in exploring with us how this approach might be tailored to your unique situation and requirements, please contact us by email or telephone:*



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