

Strategic Perspective Action Workshop

Business Advantages

This action workshop is designed for creation and implementation of a strategic direction and plan. It is not theoretical. Participants work on their business challenges, not conceptual exercises or case studies. Although the workshop is 2 1/2 days, the design also includes preparation and post workshop implementation guidance and support. The approach is a mixture of teaching, mentoring and consulting.

The workshop provides the following deliverables and increases the following competencies and behaviors:

Key Deliverables



Prep and Workshop

- Stakeholder Interviews
- Leader's Passion & Values
- Connection to Company Strategic Direction and/or Shareholders/BOD Expectations
- Environmental & Competitive Scan
- Initial Vision Statement
- Strategic Analysis (strengths, weaknesses, etc.)



Prep and Workshop

- Vision for Leader's Organization
- Initial Key Success Measures
- Preliminary Strategies
- Vision and Strategy Story to Engage Others
- Change Management Components of Strategic Change
- Action Plan to Increase Influence with 2 Key Stakeholders
- Implementation Plan for Next Steps



Post Workshop

- Revised Strategic Components Based on Team and Key Stakeholder Input
- Completed Strategic Plan
- Completed Action Plan with Owners and Key Success Indicators
- Plan for Monitoring Progress

**Post workshop deliverables dependent on leader's follow-through*

Competencies and Behaviors

Strategic Planning:

- Utilizing vision, strategic acumen, knowledge and intuition to determine the future direction
- Creating a compelling and realistic future direction for the organization
- Connecting the organizational strategies to the company's strategies and/or key stakeholder's expectations
- Determining the right core capabilities and strategies to reach the vision
- Challenging assumptions that may no longer be true to ensure the future direction is aligning to a realistic analysis of the current state
- Engaging team members and key stakeholders in the strategic planning process
- Prioritizing strategies to ensure that the organization is not overwhelmed

Strategic Thinking:

- Acting with a company-wide perspective
- Gaining value for a broader, long-term perspective as well as value for details and specifics
- Synthesizing data, information and opinions to identify the strategic implications
- Observing trends to anticipate future needs and proactively preparing the business to respond appropriately

Change Management

- Gaining value for the components required to lead successful change
- Creating a compelling vision to enlist and lead others through change
- Anticipating areas of resistance and addressing these proactively
- Creating a compelling burning platform to create immediate action

Decision Making:

- Establishing a firm direction without 100% certainty and trusting that the direction set is the best possible for this point in time
- Monitoring shifting trends and changes to the external environment to adjust decisions without waiting for direction
- Analyzing priorities to determine the "need to do" versus "nice to do" activities
- Incorporating other styles of decision making to eliminate personal blind spots

Communication Skills

- Speaking in exciting ways about the business's future by connecting with passion and energy
- Inspiring confidence and mobilizing others to action through the use of story telling and change management
- Rallying the organization around a common cause and creating a source of pride to increase employee engagement

Influencing Skills

- Building stronger relationships with key stakeholders
- Adjusting influence style to engage and enlist others whose style differs
- Enlisting key stakeholders to gain valuable feedback and increase ownership

The leader invests the following amount of time to gain these deliverables, competencies and behaviors:

- ❖ *4 weeks prior to workshop: Pre-call meeting to establish expectations and instructions on pre-work. 3 key stakeholder interviews, strategic data gathering, and influencing assessment (approximately 5 hours)*
- ❖ *Workshop: 2 ¹/₂ days*
 - *Monday 8am-8pm*
 - *Tuesday 8am-6pm plus evening creation of vision story (approx. 2 hours)*
 - *Wednesday 8am-1pm*
- ❖ *One week follow-up group call to complete preparation for team and stakeholder engagement*
- ❖ *Implementation of team and stakeholder engagement in strategic planning (implementation time depends on span of control and complexity)*
- ❖ *Group call to ensure success one month following workshop*
- ❖ *1 Individual Coaching Call to address specific challenges (scheduled at leader's discretion)*

Investment: \$4,778