CASE STUDY
Development of Strategic Thinking & Planning Process

CLIENT
Technology Company, 4,200 employees

CHALLENGE
Company did not have a consistent thinking and planning process in place and the quality of strategy differed dramatically across the organization. Desire was to create a uniform strategic thinking and planning process for the organization while at the same time, build the strategic thinking skills of its mid- and senior-level managers.

NEEDS
• Create a strategic thinking & planning process that can be used year round.
• Build an organizational competency in strategic thinking.
• Develop middle and senior manager’s strategy skills to help them proactively set strategic direction and successfully execute strategic initiatives.

SOLUTION
1. Telephone interviews with a sample of mid- and senior-level executives to identify the current business context and their key challenges and issues.
2. Creation of a five-phase strategy development process to fit with the organization’s current processes (operations & budgeting).
3. Session pre-work included participants taking the Strategic Thinking Assessment to baseline the current level of strategic thinking among the group; completion of the Strategy Survey—a tool designed to focus executive’s thinking on the critical components of the business; and review of several cornerstone strategy articles.
4. Development and facilitation of a two-day strategy off-site sessions for senior executives. First half-day focused on education of key strategy concepts. Remaining 1½ days of session focused on applying the strategy tools to their business in small group settings.
5. Consultation with leaders to help them facilitate additional strategy input meetings with other groups in the organization.
6. Customization of the StrategyPrint template to act as the organization’s business blueprint and feedback on its development.
7. Consultation with two senior leaders to help them present the resulting strategic plan to the board of directors.

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8. Facilitation of a one-day strategy execution meeting to discuss ways to ensure the successful implementation of the strategic plan.

9. Senior managers access to the Strategy Vault online resource center to provide them with tools and templates to develop and execute strategy throughout the year.

10. Development of guidelines for Strategy Tune-up Sessions. The Strategy Tune-up stimulates thinking and discussion on the market, customers, competitors and the company. Leaders agreed to conduct the 2-hour Strategy Tune-ups on a monthly basis to calibrate plans as necessary.

CLIENT RESULTS & COMMENTS

- Double-digit percentage increase in revenue and single-digit increase in profit after year one of implementation.
- Organization developed and tailored the five-phase strategy development process to fit their needs, giving them a proven process to use in the years to come.
- Senior leaders reported greater confidence in the organization's strategic direction after going through a comprehensive and methodical process to help them think through all of their possible options.
- Senior leaders each developed StrategyPrints for their business units and were able to use them to drive daily activities in support of the key strategic initiatives.

"I appreciated your ability to teach/facilitate/moderate and move us through the strategy development process in a productive fashion. Your modular and highly tailored approach of the process to our business fit our needs nicely. One year later, your work had a dramatically positive impact on our business. In addition to the strong strategic plan we developed, you infused a new mind set into our organization that has created the strategic discipline to make important trade-offs and has unleashed a powerful energy of confidence. You've truly made a difference to our business."

Company President

“Rich does an excellent job in assisting individuals throughout various levels of an organization understand that while strategy is a somewhat abstract and intangible concept, there are a variety of tools and methods available to practically apply it to their business. His presentations and workbooks are thoughtfully constructed, understandable and useful in leading a group through a comprehensive and objective analysis of their business that ultimately results in action plans focused on differentiating themselves from the competition. His grasp of the topic of strategy along with a comfortable and upbeat presentation style is effective in facilitating strategic thinking and strategy skills development.”

Chief Operating Officer