

CASE STUDY

Strategic Advisory & Planning



CHALLENGE



The executive leadership team (ELT) possessed a wealth of clinical expertise and was looking to increase their business acumen to develop global strategies.

NEEDS



- 1 Create a common language and understanding of strategy.
- 2 Develop the ELT's strategic thinking and planning capabilities.
- 3 Design a simple yet comprehensive strategy development process resulting in a concise strategic plan.

SOLUTION



- **Interviewed a sample of executive leaders** to understand their perspectives on the business.
- **ELT members completed the Strategy Survey** to begin thinking holistically about the market, customers, competitors, and company prior to the in-person workshops. The Strategy Survey responses were then compiled and distributed to the ELT so they could review each other's thinking and perspectives prior to the in-person workshop.
- **ELT members completed additional pre-work** including reading the white paper, "The Strategic Thinking & Planning Primer," and viewing the video, "What is Strategic Thinking?"
- **ELT members participated in a two-day offsite strategy workshop** with the hybrid approach of increasing their strategic capabilities while working through key business issues leading to future strategies.
- **Three additional offsite meetings of two days each** were held for the next tier of leaders at their site locations in the U.S., U.K., and Germany.
- **Conducted a one-day follow-up session with the CEO and COO to finalize global strategic direction** and language around the goals, objectives, strategies and tactics for the company.
- **Customized the two-page StrategyPrint (strategic action plan) template** to use the terminology that worked best for the group and consulted with leaders individually to review their plans and provide feedback.

RESULTS

In the 12 months following the engagement, the company realized an

**11% INCREASE
IN REVENUE**

due to the creation of innovative strategies.

Company realized a

**15% REDUCTION
IN COSTS**

due to increased discipline in making strategic trade-offs with their resources.

CLIENT COMMENTS



“ 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 fits our needs nicely. Thank you for your preparation and hard work in navigating our executive team and next level leaders through these strategy sessions. One year later, I can say that 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.

Don Pogorzelski, President



“ You did an excellent job assisting individuals throughout the various levels of the organization to understand that while strategy is a somewhat abstract and intangible concept, there are a variety of tools and methods available to guide teams through a definable process that leads to a well structured and focused strategy development effort. Your materials 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. Your grasp of the topic of strategy along with a comfortable and upbeat presentation style is effective in facilitating the overall strategic thinking effort.

Jerry Casey, Senior Vice President



“ Rich's skill in facilitation and leading teams is key in delivering his concepts on strategic thinking. He is creative in the approach and development of thinking tools but not intrusive. He encourages his clients to build the strategic process themselves, draw their own conclusions consistent with their business and follows up to make sure they are 'living the process.' I would recommend Rich to leaders who want to build strategy and want value for their investment.

Norman Tashash, VP of Sales & Marketing

For more information and to discuss your team's strategic capability and planning needs, visit StrategySkills.com

