Case Study

Strategic Workshops for Executive Teams

Rich Horwath, Founder & CEO

Client: Wonderlic

Situation

The recently appointed CEO was seeking a strategy facilitator to lead the executive team through the strategy development process to produce a concise strategic framework that they could use to guide the business and share with the board of directors.

Needs Identified

1. Generate new insights to set strategic direction.
2. Create a common language for discussing strategy.
3. Develop a strategic framework to align resources toward a common set of goals and communicate direction to employees.
4. Provide the executive leadership team with additional strategy tools and frameworks to think, plan, and execute on their business.
5. Enhance resource allocation through the prioritization of initiatives.

Service Offerings

Strategy Facilitation
Strategy Process Design
Strategic Capability Development

Solution

Conducted interviews with a sample of the executive team to gain perspectives on the business.

Leaders completed the Strategy Survey to provide insights on the market, customers, competitors and company's strengths, weakness, opportunities, and threats.

Leaders completed an Organizational Assessment to identify areas for enhancement.

Conducted multi-day strategy workshops with the executive leadership team over six weeks to think strategically about the business, generate new insights, and create the strategic framework.

Results

Created a common language for discussing strategy.

Provided a forum and frameworks to harness people's best thinking and generate new strategic insights for the business.

Identified what changes needed to be made by working through trade-offs.

Assessed the competitive landscape and discussed how to optimally position the organization for competitive advantage.

Designed a one-page strategic framework that communicated the mission, vision, goals, objectives, strategies, and tactics.

Created a shared understanding of the business to put everyone on the same page.

Developed a concise overview of the strategy process to share with the board of directors.

Set Clear Strategic Direction

Leader's Comments

"Rich's talent for facilitation and his practical working exercises led our team through invaluable dialogue about our business. We emerged from our time with Rich with a shared understanding of strategic vision, a desire to engage in necessary resource allocation conversations, a clearer understanding of our position within our competitive set, and tools that will serve as living strategy documents.

Rich is not only an extremely competent thought leader regarding business strategy, but is also an amazing facilitator and presenter. His ability to create a space in which critical insights are both encouraged and required and his sincere desire to see that the teams with whom he engages are successful is readily apparent. I consider myself fortunate to have had the chance to work with Rich and would recommend him as a trusted advisor to any teams about to embark on a deep dive of their business strategy."

David Hammond, ***President, Wonderlic***

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