



## ***Five Essentials for Facilitating Strategic Alignment Sessions***

One of the realities of the work place is that we are juggling quite a few things at the same time making it difficult to take a “time out” to first of all think strategically, and then second ensuring all the members of the management team are aligned on the strategy.

One of the proven ways to get companies to define and become aligned on Strategy is to follow a 5 step process executed in a one or two day workshop with quarterly follow-up to ensure success.



The five recommended steps of the methodology are:

1. Identify Trends in the Market Place
2. Focus on Current Strengths and Weaknesses
3. Create the Vision of the Future
4. Identify the Opportunity Map
5. Develop Executable Delivery Plans

### **Identify Trends in the Market Place:**

Considered as the warm-up to the session, this is usually a fun exercise where all kinds of ideas flow from the participants. The key benefit of this session is actually to place participants in the correct frame of mind for the next sessions since industry trends remind people of being left behind, and cross industry trends is where all the ideas get generated for the game changers.

### Focus on Current Strengths and Weaknesses.

One cannot create the future without fully understanding the present by participants discussing the weaknesses then strengths of the organization. The reality is that all companies have strengths, and it is important to ensure that participants are pushed hard to identify all of them because at times one of these could serve as the foundation for one of the initiatives on the opportunity map.

### Create the Vision of the Future.

Discussions on trends, strengths and weaknesses with proper alignment allow the participants to get in the correct frame of mind to define the future. The best way to approach this is to first create a scenario such as, “We are meeting exactly 3 years from today and have transformed the organization to be #1 in our space” and then go around the room asking a question such as “What is the one thing that we are doing as a #1 company that we are not doing today”.

The total number of “one thing” will vary depending upon the number of participants, and the approach will have to be adjusted to ensure that all the ideas were documented. At the same time, we have a manageable number of ideas that we can work with as we transition into the next session, and ideally the total number falls in the 6 to 14 range.

### Identify the Opportunity Map.

Fully vetted opportunities are now ready to be mapped in an Opportunity Map matrix where each Opportunity is mapped across two dimensions such as “Current State” to “Value Delivered” or “Time to Market” or “Cost of Implementation”, etc.

If we have ten opportunities that we are mapping, our objective should be to identify them into 3 or 4 equal groups allowing us to focus on the top opportunities relative to each other.

### Develop Executable Delivery Plans

We all know that the intent is always good, but as soon as participants leave the workshop and get immersed in the daily flow of things, the best of intents do not get executed.

To increase the probability of getting to where we said we will be in 3 years, we need to develop an execution plan that would have a clear owner, working team, clear milestones, cost that's justifiable, and at a minimum quarterly milestone review with the same team that can hold each other responsible to get to the next level.

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