



# Leading Strategic Change in Your Organization

2011 MOWAA Annual Conference and Expo  
August 31, 2011



## Today's Workshop

- Explore the need to “plan” versus desire to “do”
- Identify different models for strategic thinking and planning
- Highlight ways to have thoughtful strategic conversations at all levels of the organization with multiple stakeholders

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## **Describe your strategic journeys**



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## **What do you want/need from this workshop?**

- What keeps you up at night?
- How do you want to share?
- What do you want to learn from each other?
- What do you need to do when you get home?

○○○ | **Today's realities  
require us to:**

- Deliver the details while framing the vision
- Challenge the status quo when the status of our quo seems uncertain
- Recommend client-centric business options
- Demonstrate courageous behavior in a climate of uncertainty





## 3 Views of Strategic Thinking

- Required Job Skill
- Disciplined Way to Think
- Prelude to Strategic Planning

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How do we  
focus on the  
details while  
visioning the  
future?



○ ○ ○ | **How do we best serve  
our clients?**



○ ○ ○ | **How can we be  
courageous leaders?**





## Key Elements of Strategic Thinking

- Process for inviting conversation
- Can be bite-sized or bigger chunks – depending on realities or time restraints
- Thoughtful reflective time that works best when ideas are allowed to simmer
- Brings in diverse and divergent viewpoints
- Gathers information
- Creates an experience for participants

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## The Skill of Facilitation

- Make things easier
- “The art of leadership in group communication”



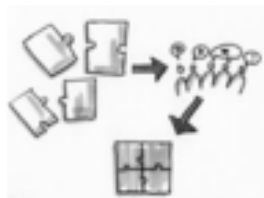


## As a facilitator, you will:

- Set direction
- Contribute structure and process to group interactions
- Enable groups to make high-quality decisions
- Reflect the conversations of the group
- Help groups understand the process in order to work more effectively
- Create a safe and learning environment
- Foster leadership in others



## Tools/Techniques for Creating the Experience



*"We cannot solve our problems with the same level of thinking that created them."*  
Albert Einstein

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## Intentional Questions

What's the difference between:

- How do we build for the future?
- How do we build to the future?
- What does being the best industrial research lab in the world mean?
- What does being the best industrial lab for the world mean?

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## Sample Questions



### **BIG PICTURE**

- Why are we in the business?
- What are our goals?
- Where – and what – do we hope to be in the future?
- What do we do if and when we get there?
- How will we measure success?
- What are the opportunities?
- How do we seize the opportunities?





## Sample Questions



### SPECIFIC GOAL, PROJECT, IDEA

- What do we do now?
- What might this look like in 2015?
- Who/what are our resources?
- How might we improve what we do?
- Today? In 6 months? In a year?

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## Stimulate strategic thinking



*"We cannot solve our problems with the same kind of thinking that created them."*  
Albert Einstein



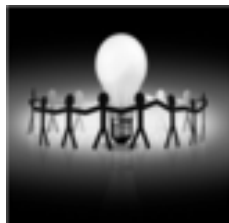
Thinking is the hardest work there is, which is probably the reason why so few engage in it.  
Henry Ford





## Other Tools/Techniques

- Opening Reading, Moment
- Images; Photographs
- Share a "fan" letter; Share a "complaint"



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## Strategic Think Tank





## **What are the “burning issues” we need to discuss?**

- Frame the issue for all to understand
- Invite diverse opinions/voices
- Select 2-3 key questions
- Encourage healthy debate and dialogue



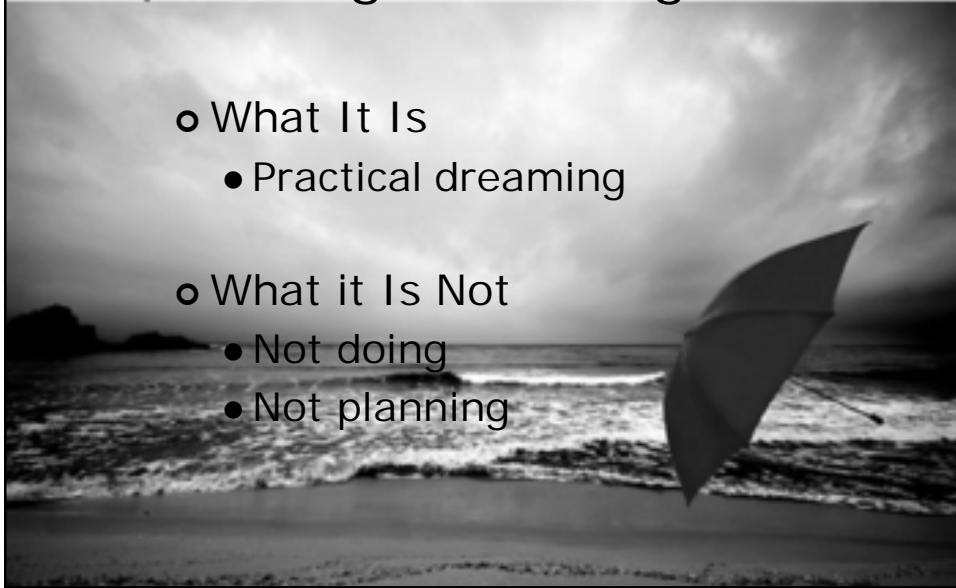
## **Integration of Strategic Thinking**

- Board, staff meetings
- Community conversations
- Journaling
- Invite dialogue through website, social media
- Thinking/planning sessions
- Surveys



## Strategic Thinking

- What It Is
  - Practical dreaming
- What it Is Not
  - Not doing
  - Not planning



## Prelude to Strategic Planning

- Listen → Discover



- Reflection → Action





## Strategic Planning

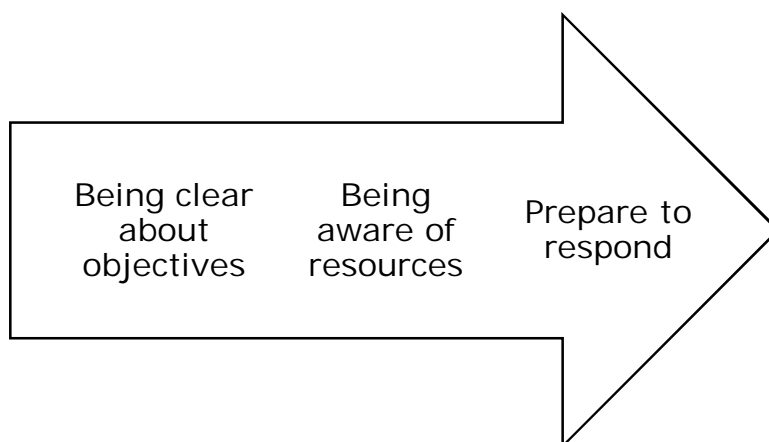
- Helps an organization do a better job
  - Focus energy
  - Ensure that members of the organization are working toward the same goals
  - Assess and adjust the organization's direction in response to a changing environment

## ○○○ | Strategic Planning

Disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, with a focus on the future.

- Adapted from Bryson's Strategic Planning in Public and Nonprofit Organizations

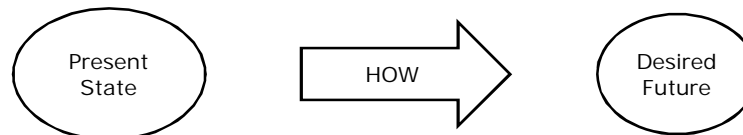
## ○○○ | Strategic Planning





## Intentional Journey to Strategic Planning

- Deliberate and focused plan and process
- Ability to execute ruthlessly based on priorities and goals



## Strategic Planning Process



Graphic designed by Bridge Consulting



## Strategic Planning Process



Graphic Design by Zoe Training & Consulting



## Strategic Planning Process

- Mission, goals, or vision your organization will pursue
- Whom you will serve
- Your role in the community
- Kinds of programming, services, or products you will offer
- Resources needed to succeed – people, \$\$\$, expertise, relationships, facilities, etc.
- How you can best combine these resources, services, and relationships to accomplish your mission





## Strategic Planning Process



Graphic designed by Bridge Consulting



## Scanning the Environment





## Sample Questions



### **BIG PICTURE**

- Why are we in the business?
- What are our goals?
- Where – and what – do we hope to be in the future?
- What do we do if and when we get there?
- How will we measure success?
- What are the opportunities?
- How do we seize the opportunities?



## Sample Questions



### **FUTURE STATE**

- What is needed, wanted, or wished?
- Who are the audiences, stakeholders, customers, clients, collaborators, partners?
- How should success look?
- How should success feel?
- What evaluation criteria should be used to measure success?



## Sample Questions



### ANALYSIS

- What are we going to be?
- What are we going to deliver?
- What are potential obstacles or challenges, and how can they be overcome?
- Who/what are our resources?

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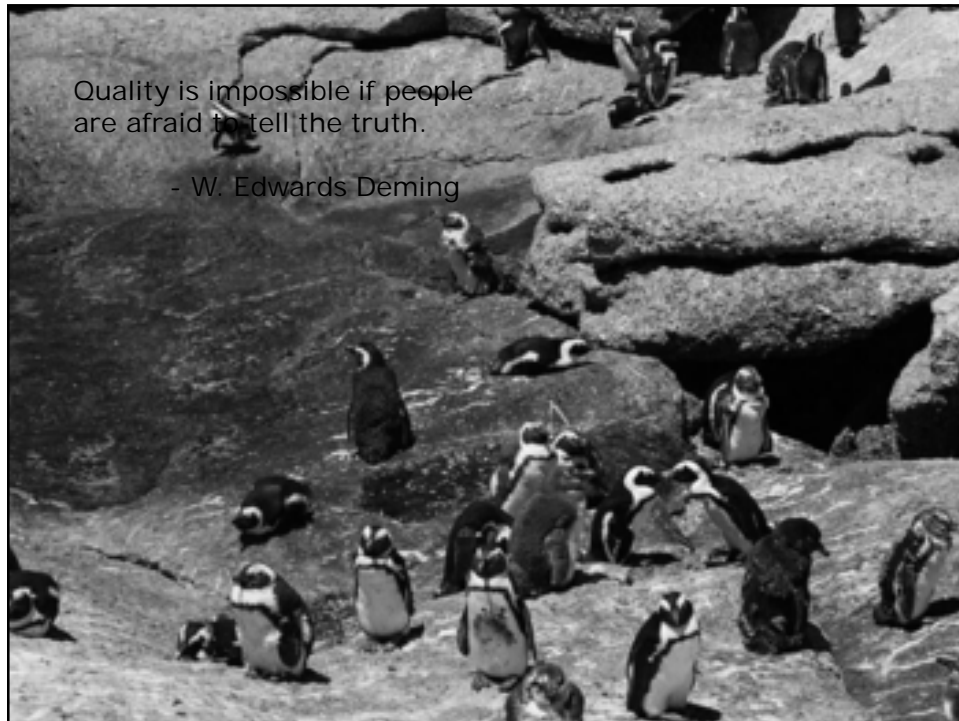
## Sample Questions



### ASSESSMENT

- What is the “state of the state”?
- What is important to us as a team, business unit, organization?
- What assumptions do we need to test or challenge here in thinking about \_\_\_\_\_?
- What are the challenges/opportunities in \_\_\_\_\_?

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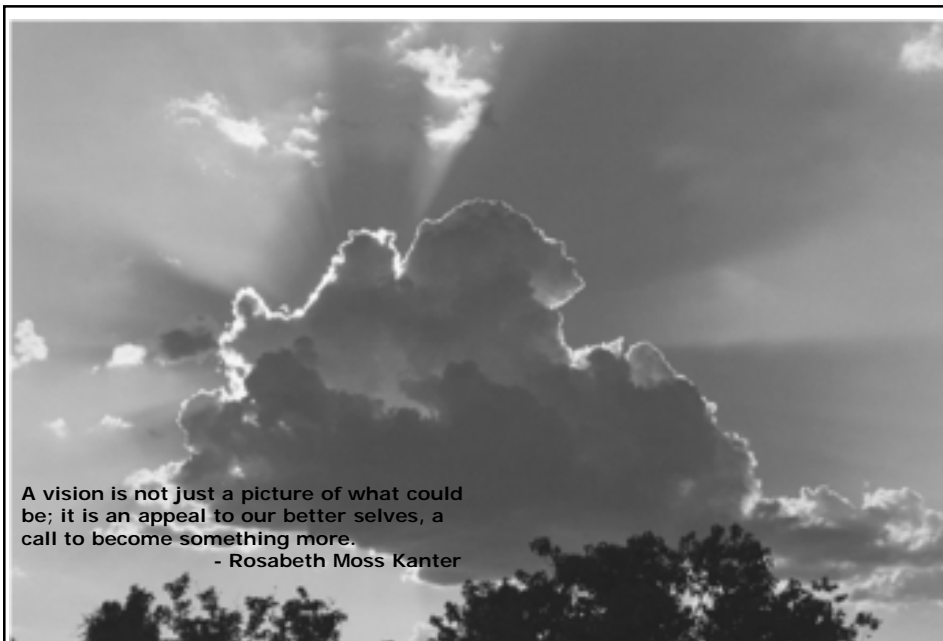




## Finding the Fit



Adapted from Barry's  
Strategic Planning Workbook



A vision is not just a picture of what could be; it is an appeal to our better selves, a call to become something more.

- Rosabeth Moss Kanter



## Strategic Planning Process



Graphic designed by Bridge Consulting



## Strategy Mapping

- What does yours look like?
- What is included? What is not?
- Who do you share it with? When? How?
- How do you “keep it alive”?

## ○○○ | Roadmap to the Future

- Clear and compelling vision
- Purpose, mission
- Guiding principles, values
- Honest, realistic appraisal of the present
- Internal and external scan of the environment
- Strategic directions
- Action plans, resource allocation, measures
- Assessment, review, and refinement





## Strategic Planning Process



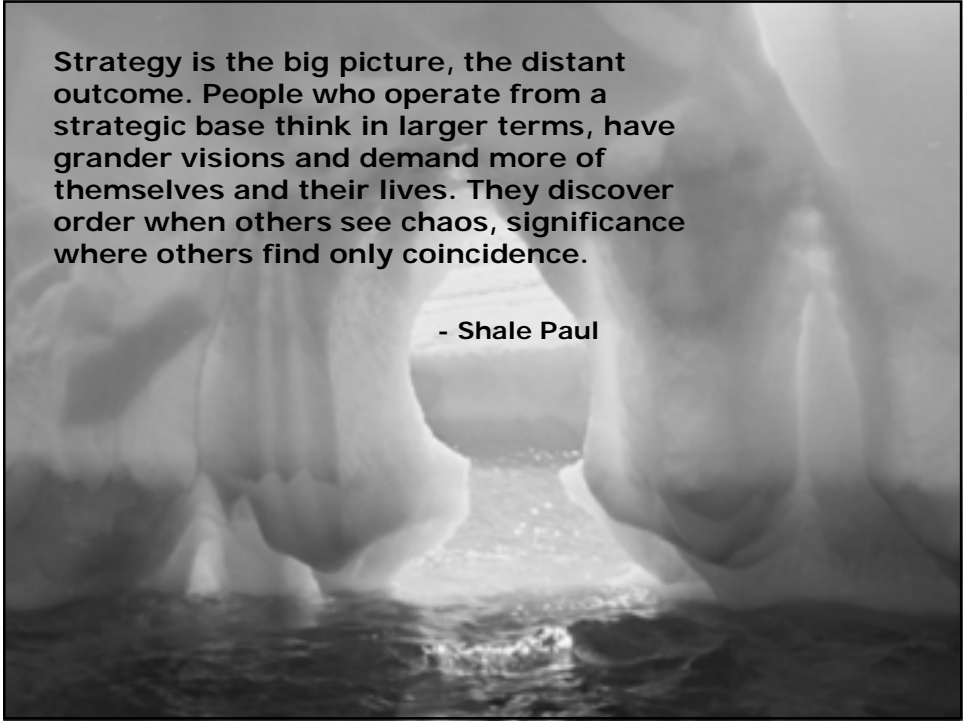
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## Execute, Assess, and Refine

- Who will be responsible for execution?  
Are the activities “hard-wired” into the organization?
- Who will offer feedback on progress and suggestions for refinement?
- How will progress be measured and reported?
- Is the plan nimble and flexible enough to respond to the changing environment?





Strategy is the big picture, the distant outcome. People who operate from a strategic base think in larger terms, have grander visions and demand more of themselves and their lives. They discover order when others see chaos, significance where others find only coincidence.

- Shale Paul



## Reading/Tools

- Learning to Lead: A Workbook on Becoming A Leader by Warren Bennis & Joan Goldsmith (2003) – section on strategic thinking; overall excellent leader workbook
- Finding Our Way: Leadership for an Uncertain Time by Margaret J. Wheatley (2005) – book contains essays, articles, poems, and exercises from innovative and influential organizational thinker
- Brainsteering by Kevin P. Coyne & Shawn T. Coyne (2001) – guidance for asking better questions
- *Know Brainer Tool* – Creativity and Innovation Planning Tool, [www.solutionpeople.com](http://www.solutionpeople.com)



## Reading/Tools

- Strategic Planning Workbook for Nonprofit Organizations by Bryan W. Barry (1997) – straightforward guide to strategic planning suggesting diverse approaches based on organization; contains CD with worksheets
- Strategic Planning for Public and NonProfit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement by John M. Bryson (3<sup>rd</sup> edition, 2004) – highly influential nonprofit strategic planning resource
- Facilitator, creativity, and innovation exercises can be adapted for strategic thinking purposes – light bulb exercises; hot pen journaling; strategy maps



Reflections