STRATEGIC DESIGN AND CORPORATE SOUL

“It’s not just about the next product or service, it’s about what your company or organization is willing to become and to what it is willing to commit. We can write strategic plans all day long, but working with you on your destiny, and the formation of the corporate soul, to get you there are critical steps of strategic design.”

*Dwight Eisenhower*
STRATEGIC DESIGN

**Grounding** the team with where we are before advancing into future-based conversation is a key aspect of bonding everyone for an intense day of strategic work. “Celebrations” engages retreat participants in remembering the achievements of the most recent journey, creating articulation of common successes, their contributions, and most importantly frames the day from a positive mindset.

**Reviewing** the current vision, mission, values, and goals reminds everyone of our current commitments and from whence we’ve come, including where we may have fallen short, for incorporation into our next plans.

**Leaping** into the future from 50,000 feet, with exposure to the exponential changes of “What’s Coming” to all businesses, is a critical precursor to getting down to work. This segment is intended to open minds, shatter preconceptions, make team members uncomfortable, and get them ready to operate from the future.

**Assessing** our Strategic Capacity forces us to take a look at both our internal and external worlds, to acknowledge our core competencies that will continue to pay dividends, and to recognize in the world ahead where we may need to make significant adjustments. This is the reality check part of the day.

**Designing** our Strategic Vision & Outcomes includes exposure to some additional information about what an outcome is, and is not, so we reach for the future, while understanding it is not a to do list, nor a measurable objective, but a declared state of what will be different when it is accomplished – for our company, for our customers, and for our employees.

**Detailing** incorporates crafting strategies to make our outcomes come alive, prioritization of our capacity to accomplish them, and identification of which will give us the biggest strides towards accomplishing the desired end result. We may have competing priorities from those we would desire to come first vs. those that have to come first in order to make sure that infrastructure and capacity are in place. These issues will come to light as we lobby for priorities.

**Deciding** what our Strategic Focus is going to be by selecting only a couple of key priorities for the coming year will birth the discernment conversation. Any strategic process can yield many new great ideas, but which will we agree to put our energy behind that will leverage the company the furthest? What discipline will we put in place around our ongoing processes to ensure the focus remains intact?

**Concluding** at the end of the day, we will visit together about our work, accomplishments, hopes, and experiences to put a capstone on a great day of energized teamwork, creating a dynamic future that the team will author together.
STRATEGIC DESTINY AND CORPORATE SOUL DESIGN

Following the development of the strategic vision and plan, there are four significant areas that affect implementation and next steps. How you go about this, whether you pay attention to it and integrate your behaviors with your values, will determine your corporate soul and how others brand that soul, ultimately defining your success.

Key Measures of Success

It is critical for all to know how we will measure success: value adherence, safety, client satisfaction, profit maximization, people development, growth, corporate citizenship, turnover rates, customer acquisition, business evolution preparation, or succession planning, as examples. These decisions should flow through to the messaging about the plan, the performance expectations of employees, and the marketing to customers.
and potential customers. These are the bold statements that articulate, “You will know us by……” and will precede any cheers of celebration. They are trust builders with employees and customers and morale glue. The budget, performance review language, marketing, and all processes should be dotted lines back to these indicators.

Communications Plan/Language Creation

One of the biggest reasons strategic planning lies dormant is the failure to create common language around the journey all affected parties are being asked to go on. What is the theme of journey? Where are the destinations? How is it going to be messaged to employees, clients, potential clients, vendors, partners, or investors? What mechanisms will be used – monthly meetings, social media, company newsletters, the website? Who is responsible for its articulation and monitoring the consistency of bringing the plan to life? One leader mentioning it at a monthly meeting makes it the leader’s plan. The words we speak can powerfully create the future we will live in. How will you bring your strategic vision and destiny to life within your team?

Generational (Workforce) Transition & Engagement Plan

Every company and organization across the world is going through, and being affected by, the largest generational transition in memory. Add to that over 70% of America’s employees indicating that they are not engaged, and we have a significant issue at hand to lead and manage.

There is the current state of affairs in terms of how many generations are represented, whether they are directive or collaborative in cultural style, and how well millenials are being integrated. They are now the largest generation in the workforce and readily admit to their lack of preparation for leadership.

The interim state comes next, in which we will reside until all boomers have retired, Gen Xers have led, and Millenials take over earlier, because there aren’t enough Xers.

Lastly, we enter the future state when our companies or organizations complete a shift to a generation that bears no resemblance to current leadership. A preparation plan integrated into the newly designed strategic plan can provide the opportunity to lead from a position of planned strength through the generational transition. We must uncover how to foster collaboration, engagement, and a desire to be future leaders.

Secondarily, there is the consideration of the change in your customers and the vendors supplying your company or organization. Who is leading their companies? How are their expectations, methods of communicating, and desires changing as their workforce morphs? How will those who currently work for your company be prepared to interact with them?
**Succession Planning**

Whether it’s first generation passing to second generation, second to third, a sale, a buy-out, a merger, an ESOP, or a board leadership transition, at some point, every company and organization has to decide what’s next. After designing a new strategic plan, it should be apparent what is before the company or organization, whether it’s maintenance, growth, or preparation for a transition of ownership or leadership. Visiting this conversation, in the privacy of senior management, as a board, or solely as a proprietor, provides the opportunity to think through potential parallel steps that may need to occur at the same time the next phase of the new plan is unfolding. What needs exploring in tandem with the new strategic plan about the short and long-term succession of key players in the business and the company itself?

**What are you willing to become? To what are you willing to commit? What will we know you by?**