

Strategy Development Events

Purpose and format

This activity is intended for the Executive Team in an organisation (or sometimes large departments) to develop or review organisational (or departmental) strategies.

The exact content and remits will be tailor-made to suit the circumstances and will take into account whether or not there are already strategies in place, how long ago they were developed and how successful they have been. The event can include:

- Designing or reviewing the organisation's Annual Corporate Planning Process
- Mission and Vision review
- Defining the Strategy Horizon (i.e. what period the strategies are intended to cover)
- Developing new strategies or reviewing existing strategies
- Populating or reviewing the detail of each strategy

This is a highly practical event but can't be 'done by brainstorming' - a deep level of thinking is required. This therefore requires 2 days, preferably off-site at a location conducive to strategic thinking. The activity should be carried out annually and gets easier and quicker year-on-year, particularly when combined with an Executive Event 6 months in.

The chronology of the 2 days

There is a tried-and-tested sequence of sessions as follows:

- (1) Individual Perspectives - Strategic Review
- (2) Leader Speaks
- (3) Rapid Strategy Teach-in/Refresher
- (4) Annual Corporate Planning Process design or review, either:
 - (a) Design the process
 - (b) Review the effectiveness of the existing process focusing on how it has worked in practice over the last 12 months
- (5) Philosophy review - Mission and Vision
- (6) Strategic Intelligence review
What has been gathered, how it has been assimilated by the Executive Team, what conclusions can be drawn and refinements for the coming year
- (7) Define the Strategy Horizon
- (8) Strategy development or review, either:
 - (a) Development of new strategies
 - (b) Light touch review of progress with the existing strategies
 - (c) Full review of existing strategiesThe output of this session is a list of the strategies, new, refined or existing

- (9) Articulate the 'what' for each strategy
This results in a clear statement of intent for each of the strategies
- (10) Populate the 'why' and 'how' for each strategy
This results in a clear understanding of the thinking that underpins each strategy and the beginning of a list of projects that will deliver them
- (11) Populate the Strategic Achievement Measures for each strategy
This results in clear measures by which the success of each strategy can be judged
- (12) Take Home Messages and Next Steps

Where does the time go?

All leaders, quite rightly, have high ambitions for what they want to get through. The time taken for each session, and therefore the whole event, depends on:

- (1) Whether this is a first attempt, a light touch review or a major review
- (2) How long it is since the last Strategy Development Event or Executive Event
- (3) How large the team is - the bigger the team, the longer everything takes
- (4) Closely linked to (2), where the team is in its development
- (5) Whether or not everyone in the team has participated in the Strategic Improvement Programme and therefore trained to an appropriate level in how to develop and implement strategy
- (6) How embedded the organisation's Annual Corporate Planning Process is, in particular the sophistication of Strategic Intelligence gathering and assimilation

Teams that invest in their development by spending time together both training in organisational improvement and working on topics of strategic importance quickly pass through Forming, Storming and Norming. A team that has reached Performing can both work more effectively together and cover more ground in the available time.

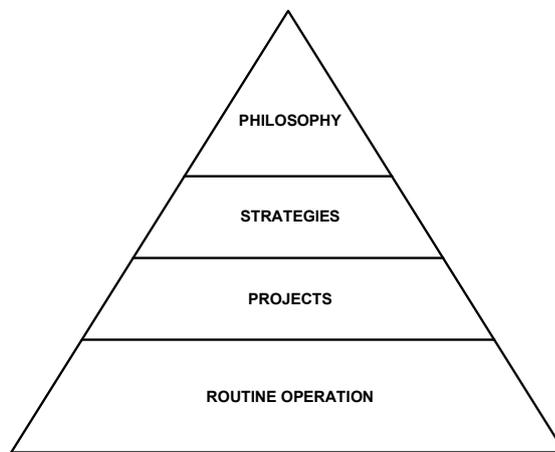
The next step

The next step following a Strategy Development Event is involvement of the Next Tier Down of senior managers - i.e. Heads of Service/Direct Reports to the Executive team. UIMPROVE terminology for this activity is the Leadership Forum Strategy Review.

Executive Teams that have good experience of strategy development and review should plan for a minimal gap between the two activities. This can be as soon as the next day or later in the same week.

The Organisational Activity Model

This is the model we use for linking philosophy and strategies with projects and routine operation:



The Organisational Activity Model explains the different types of activity in an organisation and puts strategy development into context. Work gets done and the customer is served through routine operation. Routine operation is improved through projects. Projects are set up as a result of strategies. Strategies are developed as a result of philosophy - principally the Mission and Vision of the organisation.

How we work with you

Planning Meeting - We will hold a meeting with the leader of the organisation or department to find out the background, the status of any current strategies, objectives, who is involved, issues and other relevant information. If necessary, 1-1 meetings can be held with other key individuals to find out their viewpoints.

Proposal - We will prepare a proposal outlining the structure and contents of the event.

Design - We design the remits for each session of the event.

Delivery - We facilitate the event.

Review letter - We provide a written review of the event so there is a permanent record of who was there, what we did, reflections and recommendations.

Review Meeting - Finally we hold a Review Meeting to talk through and explain our reflections and recommendations, find out what's happened since, give guidance on next steps and answer any questions.

Further reading

- The Complete Guide to Improvement, section 6, How to Develop and Implement Strategy
- UIC Briefing Note - Leadership Forum Strategy Review
- UIC Briefing Note - Strategic Improvement Programme
- UIC Briefing Note - Executive Events