

Strategy Kit for Teams

Getting Your Team Moving in the Right Direction



CMOE's Strategy Kit: An Introduction

With the new year nearly upon us, right now is the perfect time to work with your team to set a strategic direction for 2016. Creating and executing on strategic initiatives and plans for the team, function, or piece of the business you lead provides clarity in three key areas:

- What winning means for you, and what everyone should be working towards.
- How your team and its strategy aligns with, supports, and contributes to the organization's overarching strategy.
- The dual roles and responsibilities of each team member: 1) successfully executing on short-term responsibilities and 2) influencing and shaping the long-term, sustained success and relevance of the team and organization.

Pausing the day-to-day action to step back and engage in a structured and disciplined strategic-planning process gives you and your team the foundation needed to launch into 2016 with a new level of focus and direction—and will help position you for long-term success.

The tools and resources in this kit are designed to help leaders—at all levels of the business—get started on developing a basic strategic direction with their teams. This will help leaders like you, and your team members, move from a short-term, reactionary mode into a mindset that is more strategic, proactive, and future-focused.

As you begin, try to remember that strategy in the middle of the business is relative. For some teams, “strategic” might only be 6–12 months out; other teams might need to look 3–5 years down the road. What's important is having a clear understanding of how you and your team can contribute to the success of the organization over the long run and creating a sense of ownership over that strategy. To achieve success for the organization, every member of the team (leaders and individual contributors alike) has to view strategy as part of their job and be willing to look up and out a bit more than they are right now.

Some of what we offer in this Strategy Kit may apply to your situation and some of it may not. This is only a framework, and you can pick and choose the pieces that are relevant to your situation and use them for your planning purposes as appropriate.

As you work through the tools and resources provided in this Strategy Kit, you may find that you need more ideas or further guidance on developing your ability to think strategically or design strategic plans. CMOE has written three books on these topics that may be helpful to you as you move forward:

- *The Art of Strategic Leadership: How Leaders at All Levels Prepare Themselves, Their Teams, and Organizations for the Future*
- *Ahead of the Curve: A Guide to Applied Strategic Thinking*
- *Strategy is Everyone's Job: A Guide to Strategic Leadership*

We also encourage you to visit www.cmoe.com to learn more about our strategic thinking and leadership training and retreats. Let's get started!

The Approach

The following outline is a suggested methodology for taking your team through the process of setting strategic direction. There are tools in this kit that support various aspects of the process. Keep in mind that setting or resetting your strategic direction doesn't have to be an annual ritual; you can develop strategic plans at any time to ensure that your team is aligned and continues to be relevant. Our approach to the strategic-planning process is comprised of three phases: Before, During, and After the strategic-planning meeting. While this is written as though there will be only one meeting, you may find that multiple meetings will be needed in order to solidify the targets, initiatives, and plans that your team will pursue.

... Before ...

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| 1. | <i>Get Scheduled</i> The first step in clarifying where the team is going and how it plans to get there is simply to schedule a meeting. It is critically important that you set the meeting for a specific date and time when you and your team can step back from your operational demands and shift to a longer-term perspective. Select a date and time when disruptions will be minimized and the team will be fully engaged and focused. |
| 2. | <i>Get Prepared</i> Scheduling the meeting itself is important, but it is also crucial that you come to the meeting prepared—and that means you'll need to set an appointment with yourself in advance to step back, take a broader look, and shift into a more-strategic frame of mind. Without this preparation, it will be challenging to fulfill today's expectations while also preparing to meet tomorrow's demands. Prior to the meeting, you need to take some time out, really look at where you need to take your team, and have a crystal-clear understanding of what it will take to win. |
| 3. | <i>Get People Thinking</i> The best way to get a strategy-planning meeting started out on the right track is to help your team understand what they will be expected to do and how they will be expected to contribute. Ask them to engage in some focused strategic thinking prior to the meeting. Send an email invitation that includes some of your goals and expectations (see Tool #1 for an example of a pre-work letter you can customize for your situation), and provide some pre-work |

questions for your team members to reflect on in advance (See **Tool #2** for examples of pre-work questions you might use to stimulate the strategic-thinking process). Be sure to customize the questions for your team's situation and give people enough time to thoughtfully respond. Providing your team members with these assignments ahead of time will give them the opportunity to be more creative and thoughtful than they might be otherwise.

... During ...

1.

Set the Stage

It is important to get your team members engaged and create an environment where people feel comfortable speaking up and sharing their ideas. It needs to be safe and acceptable for team members to ask questions, explore ideas, and express their creativity.

Start by stimulating the initial dialogue. Clarify for the group what the purpose of the meeting is and explain the broader vision you have for the future. Explain that you will serve as the facilitator during this meeting; it will be your job to stay neutral and guide the group through the discussion. Remember, involving the team in an open discussion about the team's direction ensures greater ownership of and commitment to the team's strategic direction and plans.

Before you dive into talking about the strategy, share your desired expectations and establish some clear ground rules for the meeting (**Tool #3** provides some sample ground rules to guide group interaction and behavior). Post your group's ground rules in a central location in the meeting room so that everyone can see them. If you need additional ideas on how to facilitate effective meetings, CMOE's book *Leading Groups to Solutions: A Practical Guide for Facilitators and Team Members* can serve as a helpful resource.

2.

Diverge

As you begin discussing the vision and strategy, express your passion for the future you see and encourage others to unleash their creativity. It might be helpful to review the strategy of the organization and/or functional area if it is available. This will help the team stay focused and remind them what they are striving towards. It may also spark some ideas about how to link and align their team strategy to the strategy of the larger organization.

Ask a question or series of questions to get the team thinking along the right lines:

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| | <ul style="list-style-type: none"> • What are the key, new, and future-focused objectives, goals, or initiatives that the team needs to focus on? • How will these things help the team contribute value and deliver benefits to the organization over the long term? <p>Tool #4 provides some sample questions you could use to help the group brainstorm ideas and consider a wide variety of perspectives and approaches. If appropriate, you may want to consider breaking a larger group into smaller discussion groups. Take a look at Tool #5 for tips and suggestions on how to lead a group through the brainstorming process. Record all of the ideas the group generates on a flipchart or whiteboard. Make sure everyone has an opportunity to contribute and avoid evaluating the quality of the ideas at this point. The goal of a brainstorm is simply to collect as many ideas as possible, not to judge their plausibility.</p> |
| <p style="font-size: 2em; font-weight: bold;">3.</p> | <p><i>Converge</i></p> <p>After you have exhausted the group’s creativity and captured a broad range of ideas and possibilities, help the group converge on the goals or ideas that have the most relevance and will drive the organization’s long-term success. Pinpointing a few (3–5) strategic projects, priorities, or goals to pursue will bring clarity and focus to your strategy and make it actionable. You can select your strategic initiatives through a process of elimination or even ask the group to take a vote to help narrow down your priorities. Remember, don’t take on more than you and your team can handle, but do challenge the team to reach new levels of success.</p> <p>As the critical-few priorities come into focus, you want it to be easy for people to see how they can build their own strategic contributions around these areas. As such, you’ll need to develop a SMART strategic narrative for each part of the strategy. You can use Tool #6 as a reference and to learn more about the SMART criteria. Before moving on to charting a course (see below), verify with your team members that they can support and commit to the strategic initiatives or priorities that were decided upon by the group.</p> |
| <p style="font-size: 2em; font-weight: bold;">4.</p> | <p><i>Chart a Course</i></p> <p>Next, you will focus on charting a course for successful execution of the strategy. Before you get deep into the details, ask your team what the benefits are of embarking on this strategic journey. Having a discussion about the benefits will provide you and your team members with the motivation needed to get the strategy launched.</p> <p>Depending on how much time it took the group to Diverge and Converge, as well as how complex your strategy is, you may need to schedule another meeting (or series of meetings) to chart your course and create your detailed execution plan. Be careful not to overwhelm</p> |

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| | <p>the team, and recognize that giving ideas some time to incubate and revisiting them at a later date can be extremely beneficial.</p> <p>For each of the major priorities, goals, or initiatives that make up the strategy, you will need to build a supporting execution plan that contains specific steps that will move the team towards the target. Refer to Tool #7 to help the group create a detailed Plan of Action. Consider assigning a leader to each area or small team. This person can lead the effort and maintain accountability. For additional questions, discussion points, and considerations that your group may need to address in order to successfully execute on the strategy, please see Tool #8.</p> <p>Each time you meet with your team, thank them for their participation and ideas. This will give them the confidence to speak up and share their ideas, and it also inspires higher level of engagement.</p> <p>For additional ideas on how to enhance your abilities as a strategic leader, please read CMOE’s newest book, <i>The Art of Strategic Leadership: How Leaders at All Levels Prepare Themselves, Their Teams, and Organizations for the Future</i>, which will be published in March of 2016. You can pre-order the book here.</p> |
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... After ...

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| 1. | <p><i>Cascade</i></p> <p>Provide a copy of the strategy and any supporting execution plans to each person on your team and any other relevant parties. Encourage everyone to have these materials available for reference when the team meets.</p> <p>Ask each person to identify their personal strategic plans and goals for supporting the team’s strategy. You may find it helpful to have them document their intentions so you can refer back to them during performance reviews and coaching discussions, and when giving day-to-day feedback and recognition.</p> |
| 2. | <p><i>Build the Strategic Culture</i></p> <p>Effective implementation of your team’s strategy will require that you fulfill your current operational requirements while also shifting some resources and energy to rolling out the new strategic direction. All too often, teams develop a strategic direction but over time, it is forgotten. Don’t let this happen with your team. Instead, make the strategy central to how your team operates on a daily basis. For example, during team meetings, leave enough time to</p> |

- Review your progress.
- Discuss potential roadblocks.
- Solve problems.
- Measure and track.
- Maintain accountability.

If you find that a team member is not being accountable for fulfilling his or her strategic responsibilities or needs some extra help, have a coaching discussion. Refer to CMOE's book, *Win-Win Partnerships: Be on the Leading Edge with Synergistic Coaching* for tips and suggestions on how to coach effectively for performance improvement and development.

While setting strategic direction and building a proactive, strategically minded culture can seem like a lot of hard work, it is actually very manageable. All you need to do is take a step forward. The strategy-development process doesn't have to be complex, and your strategy doesn't have to be perfect. Investing in the future and making a concerted effort to identify clear targets for you and your team to work towards increases the likelihood of your sustained success and relevance. Let the tools and resources we've provided in this Strategy Kit help you navigate through the process as you embark on the future.

For additional ideas on this topic and other leadership topics, we encourage you to subscribe to the CMOE blog: www.cmoe.com/blog

The Toolkit

Tool #1: Invitation/Pre-work Letter

Dear *[name]*,

On [date], we will have the opportunity to work together on setting strategic direction for our team so we are aligned and focused on a common target. My hope is that it will propel our team to a new level of proactive planning and action. The meeting will be an active working session, so be prepared to share your ideas as we discuss our vision and strategy for our piece of the business and the initiatives, projects, and goals we will need to execute on in order to win in 2016. Prior to our meeting, please think about the pre-work questions I have provided below.

[Insert relevant pre-work questions here.]

In order to maximize this opportunity and the time we have to work together, please thoughtfully respond to these questions and come prepared to contribute your best ideas and expertise. I am looking forward to working with you on this exciting endeavor.

Sincerely,

[Your name]

Tool #2: Pre-Work Questions

Below you will find some sample pre-work questions to spark the thinking of your team members.

1. What are the strengths of our team that set us apart?
2. From your perspective, what does winning look like for our team over the next 1–3 years?
3. When you think about the broader environment in which our team operates, what do you think will be our biggest challenges and threats over the next 12–18 months?
4. What do you think our [internal/external] customer(s) will be asking for in the next 12–18 months?
5. What is our team's biggest vulnerability, most challenging handicap, or most serious limitation that we will face in the next 12–18 months?
6. What are the new opportunities that you see out there on the horizon that the team could exploit from a process or product point of view (are there innovations, creative ideas)?
7. What critical resources, support, or help will our team need to optimize our success in the next 3–5 years?

Tool #3: Sample Ground Rules and Expectations

1. Work hard with full effort; be totally committed.
2. Keep the “big picture” in mind.
3. Think and participate with enthusiasm and a positive attitude.
4. Put team goals ahead of personal goals.
5. Trust and show respect towards one another.
6. Work to understand others and listen to what they have to say.
7. Share your data and information (teach and learn).
8. Be tolerant and accept others’ ideas, thoughts, and criticisms.
9. Support team decisions and consensus (make the right choices).
10. Speak up if you don’t understand something.

Tool #4: Discussion Questions

Below you will find some questions that you might use to initiate dialogue about potential ideas, actions, goals, or initiatives that will help the team win.

- What changes are we seeing in our [internal or external] customers’ needs and expectations or environment that we need to address?
- What are our strengths that can be leveraged and weaknesses that have to be overcome?
- What opportunities and threats to the success of our team do we foresee?
- What bold changes or major initiatives do we need to be working on to ensure our team’s continued relevance and contribution to the success of the business?
- What do our stakeholders need and expect from us to support the organization’s strategy and mission?
- How can we add value and be a source of strategic advantage?
- What does the team need to do to drive better results over the long run?

Tool #5: Brainstorming Tips and Suggestions

The following tips and suggestions will help you as you guide your team through the brainstorming process.

- Have sticky notes, flipcharts, and/or a whiteboard where ideas can be recorded.
- Select an appropriate time and place for the brainstorming session so that potential distractions are minimized.
- Give everyone an opportunity to participate. Regulate the dialogue if you have participants who dominate the discussion.
- Use your facilitation skills to keep the discussion on track.
- Find ways to build on initial ideas.
- Encourage and recognize creative and innovative ideas.

Tool #6: SMART Criteria

When you create a strategic direction and formulate a strategic narrative, you want it to clearly articulate what winning is and how you plan to shape the future. You can narrow your focus and fine-tune the message by checking your strategy against the SMART criteria.

SMART Criteria

Specific

- Is it pinpointed, concrete, and clear?
- Does it contain an action verb that leads to a specific outcome?
- Have you specified how you will sustain the strategy?

Measurable

- Can you measure the strategy in terms of quantity (how much) and quality (what level)?
- How will the percentage of change be measured?

Aligned

- Is the strategy aligned with other organizational strategies?
- Does this strategy reflect your values, beliefs, and character?

Realistic

- Can this goal be achieved?
- Is the strategy within your control?
- Does the strategy demand outstanding effort but remain reasonably attainable?

Time-bound

- Is there a deadline for this strategy's end result?
- Has a start date been established?

Tool #7: Action-Plan Template

Describe some of the most important actions that will get your strategy started.

| | Action Steps | Completion Date | Notes |
|-----|--------------|-----------------|-------|
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
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| 9. | | | |
| 10. | | | |

Tool #8: Implementation Considerations

As you create a plan of action to execute on the strategy you've developed, use questions such as the following to guide the discussion with your team:

- What obstacles do we think we will face and need to overcome to be successful with this strategy?
- Who needs to be involved and support the strategy?
- What distractions could get in the way of our executing on the strategy successfully?
- What do we need to track and monitor in order to know if we are making progress? What are the measurement tools we will use?

About CMOE

The Center for Management and Organization Effectiveness (CMOE) was founded in 1978 with the vision and mission to help organizations improve their leadership and team member skills through training, consulting, and research services. Over the years, CMOE has developed highly effective, skill-based training programs, workshops, materials, and high-impact experiences that address the specific learning and development needs of individuals and organizations. Our content is designed around timely, applicable research that has practical, easily transferable relevance in the workplace. CMOE also continues to develop customized courses for our clients that make an impact on the leaders and team members of today and tomorrow. In addition, CMOE has certified facilitators located in all regions of the world, making us one of the most flexible service providers in our industry.

Sample Workshops

| | |
|------------------------------|----------------------------------|
| Coaching Skills | Virtual Leadership |
| Coaching TIPS ² ™ | Mini-MBA |
| Applied Strategic Thinking™ | Facilitation Skills |
| Exploring Teamwork | Transition into Leadership |
| Qualities of Leadership | Advanced Management & Leadership |
| Strategic Leadership | Custom Workshops and Curricula |

For a complete list of topics, for both standalone and customized workshops, please visit www.cmoe.com

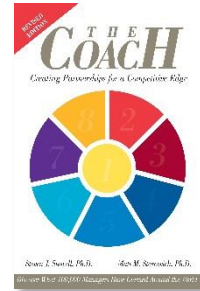
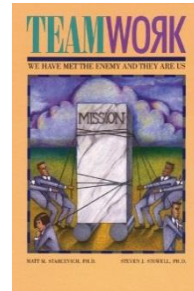
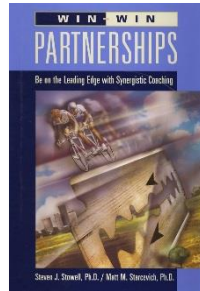
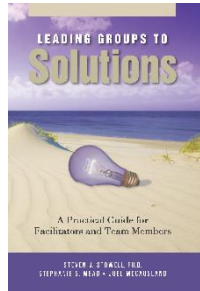
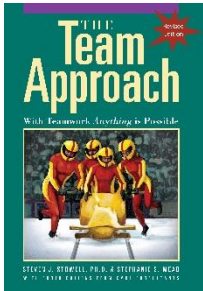
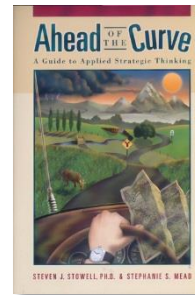
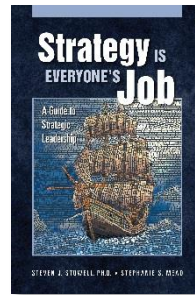
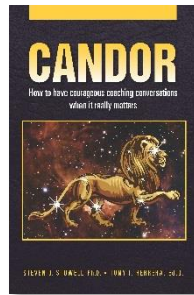
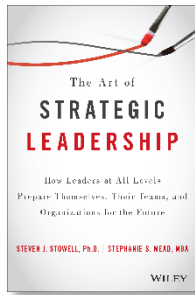
Delivery Methods

- Classroom workshops
- Blended learning
- Individual coaching and mentoring
- Sustainability services
- Train-the-Trainer services
- Webinars (Live or on-demand)
- Webcasts (Live or on-demand)
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- Committed design and facilitation teams with experience in different topics, industries, and countries.
- Unparalleled professionalism and customer service.
- Cost-effective solutions with measurable business results and ROI.
- Research-based organization with practical and transferable solutions.
- Processes for sustaining changes and client partnership over the long term.

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