

STRATEGY AND PLANNING METHODOLOGY



Putting it into action:

Phase 1: Alignment

- 1
 - Identify and prioritize over-arching business drivers.
 - Identify roles/responsibilities/communications to all stakeholders and owners.
 - Define short- and long-term goals and objectives.
 - Achieve executive alignment, agreement, and support.

Phase 2: Discovery

- 2
 - Conduct surveys, with select follow-on interviews.
 - Conduct focus groups.
 - Collect and document through above activities and others relevant processes, internal best practices, and other related information.

Phase 3: Recommendations and Reporting

- 3
 - Assemble and analyze results of discovery process, based on relevant research and benchmark findings.
 - Link all major findings to specific research.
 - Develop findings report (in PowerPoint format). Report will include key observations and findings, research-based insights, and preliminary recommendations.

Phase 4: Strategy Development

- 4
 - Develop a detailed agenda for on-site, facilitated strategy-setting session (one to two days). This session will include key executives, stakeholder representatives, and owners (maximum attendance is 15).
 - Provide findings report and other background information to all participants prior to strategy session.
 - Facilitate strategy session, with goal of building consensus.
 - Document session discussion.
 - Based on session discussion and resolutions, develop plan and executive briefing summary.

Phase 5: Final Plan and Roadmap

- 5
 - Support delivery of executive briefing and plan to key executives and stakeholders.
 - Review feedback.
 - Develop final plan and roadmap (PowerPoint format).
 - Support implementation through ongoing advice and feedback.