

Preparation	Workshop	Outcomes
1. What is the reason for this planning session or review?	1. “Making sense of strategy” presentation	<ul style="list-style-type: none"> <li>Common understanding and language of strategy, what to expect from the workshop, and an outline of the process and where it might lead</li> </ul>
2. What do you understand your company’s current strategy to be?	2. Situation review	<ul style="list-style-type: none"> <li>Summary of participants’ views from their pre-work</li> </ul>
3. How effective has that strategy been, and why? What worked? What didn’t? What’s missing? What else might have been done?	<ul style="list-style-type: none"> <li>Issues</li> <li>Assumptions</li> <li>Functional presentations (optional)</li> <li>Expert opinion (optional)</li> <li>Implications</li> </ul>	<ul style="list-style-type: none"> <li>Clarity about internal and external issues the firm must manage during the planning period</li> <li>A shared view of what lies ahead – both in the macro environment and <i>within</i> the firm itself – and what it means</li> <li>Shared understanding of the strategic challenge</li> </ul>
4. How healthy is your company today (sales, profits, productivity, resources, capabilities, culture, leadership, etc.)?		
5. What key internal or external issues must be dealt with in the next 1-3 years?		
6. What are your assumptions about the future (i.e., your outlook for both the macro environment and your company)?	3. Options	<ul style="list-style-type: none"> <li>Possibilities for future action</li> </ul>
7. How should the strategy change?	4. Choices	<ul style="list-style-type: none"> <li>Decisions about what few things to focus on doing (and what <i>not</i> to do) and the simple rules that will guide actions</li> </ul>
8. What should the priorities be?		
9. What’s needed to make the strategy reality (resources, capabilities, organizational changes, leadership, support, etc.)?	5. Roadmap	<ul style="list-style-type: none"> <li>A framework for the strategic conversation: purpose, priorities, long-term and short-term goals, 30-day actions</li> </ul>
10. What would you <i>personally</i> like from this workshop?	6. Communication	<ul style="list-style-type: none"> <li>Agreement about how the strategic conversation will be used to communicate the strategy to various stakeholders</li> </ul>

*This is a simple, sound and practical process, designed to focus attention on the right things, to provide a platform for new growth, and to ensure effective implementation. It involves your top team in a strategic conversation that makes the most of everyone’s knowledge and experience, captures their insights, inspires their creativity, and commits them to action.*

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INSIGHTS AND ADVICE FOR COMPETITIVE ADVANTAGE

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