

# Strategy Huddle™ with MyStrategicPlan:

## Getting Strategic Management on Cruise Control

Welcome!

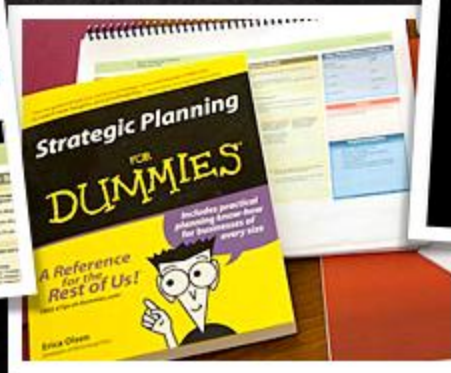
*Powered by*



- Purpose** Answer real-world questions, handle high-level strategy issues, and share best practices on strategy, execution, planning
- Duration** 45-60 minutes
- Your Role**
  - Ask questions: Questions can be submitted via the Chat Box on right at any time. \*\*
  - Offer suggestions: Share your experience via the Chat Box during the topic at hand
- Details** Session is being recorded and a follow-up email this week will include a link to this huddle as well as the supporting slides.



- ⑥ In the past three years we have...
- ⑥ Managed 100+ strategic planning processes
- ⑥ Deployed 800+ strategic management systems (MyStrategicPlan, MyNonprofitPlan, MyChurchPlan)
- ⑥ Built consensus and commitment with 3,000+ executives, managers, boards
- ⑥ Empowered 1 million+ strategist & soon-to-be strategists



## Topic: Driving change effectively

- I. Stat of the Month
- II. Getting Strategic Management on Cruise Control
  - Four stages of skill building:
    - i. Unconscious incompetence
    - ii. Conscious incompetence
    - iii. Conscious competence
    - iv. Unconscious competence
- III. Tap into the Wisdom of the Crowd: Your Questions (Time Permitting)

*98 percent of people  
feel somewhat embarrassed  
about their "productivity" skills  
and systems.*

*Source Info: David Allen – Getting Things Done - [www.davidco.com](http://www.davidco.com)*



How do you apply knowledge within your organization in an efficient and useful way?

## **FOUR STAGES OF SKILL BUILDING**

# As strategy leaders, we are building these skills:

- ⑥ **Strategic thinking**
- ⑥ Ability to **clearly articulate the right priorities** in a way that makes sense
- ⑥ **Using those priorities** (aka goals) to guide daily work and prevent tangents
- ⑥ Running or participating in meetings where these **priorities are discussed** in a meaningful way

# New skills develop through a series of stages:

	<b>Competence</b>	<b>Incompetence</b>
<b>Conscious</b>	3. Conscious competence	2. Conscious incompetence
<b>Unconscious</b>	4. Unconscious competence	1. Unconscious incompetence



I don't know, what I don't know

**UNCONSCIOUS INCOMPETENCE**

## ***What it sounds like***

- I don't know what I don't know about what I could know.
- I know something is wrong, but I'm not sure what it is, and what's causing it.

## ***What it looks like***

- Resistance to something new
- Denial of the need for a new skill
- No sense of urgency

## Moving people to the next stage:

Awareness of the lack of skill – critical step to moving to the next stage

Demonstrate the benefits:

- Show them the “sizzle”
- Set up the end state – what does a well run strategy session look and feel like?



# Hundreds of Companies & Teams

**Issue:** Lack of awareness that they are in need of a strategic management process.

**Actions:** None. Leader must drive the need to develop the skills and rigor. Leader must want to “build the muscle.”

**Result:** Wasted resources

I know, I don't know

**CONSCIOUS INCOMPETENCE**



## ***What it sounds like***

- I know exactly what I should be doing, but I'm not doing it.
- I know that I need to externalize, capture, clarify and review my commitments.
- I am avoiding next step decisions.

## ***What it looks like***

- Strategic planning sessions that failed
- Goals with no periodic check ins
- Commitment to do something different
- Call in the “experts”



## Moving people to the next stage:

### Develop the tools they need

- Strategic thinking exercises
- Discussion guidelines & agendas for meetings
- Specific templates for action plans, etc.

### Facilitate the process to model the skills

- Walk each participant individually through the pre-prep of action plan reports
- Coach the leader with talking points & questions
- Co-lead the sessions

# Global Clothing Company

**Issue:** Annual strategic planning session with no follow through – year after year

**Actions:** Decision and actions documentation from strategic planning session, executive debrief calls, guidelines for quarterly business reviews

**Result:** Executive team feels the momentum. Conversation is changing around accountability.

I know what I know, but I still have to think about it.

# **CONSCIOUS COMPETENCE**



## ***What it sounds like***

- I know what to do and I'm doing it.
- I am keeping the process in mind so that I am able to follow it.
- I really need to stay focused and "get" myself to do it regularly.

## ***What it looks like***

- Meetings run without outside assistance
- Team still needs reminders on what to pre-prep
- Leader course corrects the conversation to stay on track
- "Light bulb" goes on – team sees the value
- Getting the "right" things done

## Moving people to the next stage:

Practice, practice, practice

Allow the leader to tweak the guidelines and format to fit his/her culture

Send out reminders and helpful tips where appropriate to all team members

Don't cancel meetings or deliverables



# Boy Scouts - Council

**Issue:** Have a good strategy. Little strategic thinking. Execution is not necessarily connected.

**Actions:** Extensive customer research, diverse focus groups to generate strategies, focus groups generated goals and actions

**Result:** Exec Board & Focus chairs are sensing the energy around embedding strategy with execution – yielding desired results.



What process? This is just how we do it around here.

# **UNCONSCIOUS COMPETENCE**

## ***What it sounds like***

- I'm using the process to focus but no longer need to think about it step-by-step to accomplish the task.
- I'm free to move onto bigger things.

## ***What it looks like***

- Using goals and metrics to drive meetings and action is part of the rhythm of the business
- Highly strategic conversations – talking about the right stuff
- Team does not mix up strategy and tactics

## Keeping people at this stage:

Periodic review of what is working and what is not working to drive continuous improvement

Have leader and team periodically teach and train others



# Microsoft



**Issue:** Keeping the “muscle” strong

**Actions:** Evaluation of the process – is it driving the right behavior or are we on “autopilot”?

**Result:** Implementation of strategy sessions with more participants from the org to think deeper about how to drive the strategy

# Summary & Takeaways

- ✓ Identify what stage your team is in and actions to move them to the next stage.
- ✓ Meet people where they are – not everyone is in the same stage of learning.
- ✓ Engage the emotional and the rationale mind.
- ✓ Make the unfamiliar familiar.
- ✓ Build the “muscle” and keep it “in shape.”

Any insights you would like to share related to one of today's topics?

What are some change skill building questions you would like to discuss?



- ⑥ Next Date is May 25<sup>th</sup> 9am PT
- ⑥ Send in questions for the next Strategy Huddle to [admin@mystrategicplan.com](mailto:admin@mystrategicplan.com) (reference the Strategy Huddle in the subject line)
- ⑥ Interested in sharing/presenting a best practice as a Strategy Leader? (send email to [admin@mystrategicplan.com](mailto:admin@mystrategicplan.com) and reference the Strategy Huddle in the subject line)
- ⑥ Follow us on Facebook & Twitter @MyStrategicPlan
- ⑥ More great training available:  
[www.mystrategicplan.com/resources](http://www.mystrategicplan.com/resources)
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# Get Expertise When You Need It

One-on-one guidance for those trouble spots in your planning

[mystrategicplan.com/strategic-planning-consulting](http://mystrategicplan.com/strategic-planning-consulting)

## Quick Start Coach

Get started on the right foot and avoid pitfalls to improve the success of your plan.

- Jumpstart your plan with one-on-one assistance from a planning professional.

\$495

[Get More Info](#)

## Strategy Support

Get answers to your strategy questions, when you need them.

- Receive 3 hours of one-on-one consultation with a dedicated MSP strategy advisor.

\$495

[Get More Info](#)

## Strat Plan Review

Ensure your plan is complete, holistic and ready to implement!

- Our team will provide you with a report and specific recommendations for your plan based on years of experience.

\$695

[Get More Info](#)

## Step-by-Step Advisor

Receive a full plan and strategic process to drive your whole organization.

- A dedicated strategy advisor will guide you through the strategic planning process from start to finish.

\$4,750

[Get More Info](#)

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