



**CSO** *Collaborative*<sup>SM</sup>

**Welcome!**

**Say “hi” in chat and let us know where  
you are dialing in from.**

**We’ll be starting at the top of the hour!**

# Today's hosts:



**Jeff Brunings**

Head of Growth & Development

Principal Strategist

OnStrategy



**Erica Olsen**

CEO + Co-Founder

Principal Strategist

OnStrategy

# We're excited to have you

But first, what are  
the two reasons  
we're here?

01

## **Bring together leaders of strategy**

This group is for leaders driving strategy, OKRs and organizational performance. Aspirational leaders welcome, too.

02

## **To learn and grow – together**

We want to sharpen your mastery and inspire you with new insights and perspectives with a community of your peers.



**Our Promise: Every session, you'll walk away with one thing you can use.**

**Always @ 8-9 a.m. PT**

**1st**

### **1st Thursdays – Deep Dive**

**Featured Deep Dive:** insight, perspectives, and real-world practices presented in collaboration with your peers. Ample time for Q&A will be provided.

**3rd**

### **3rd Thursdays – Workshop**

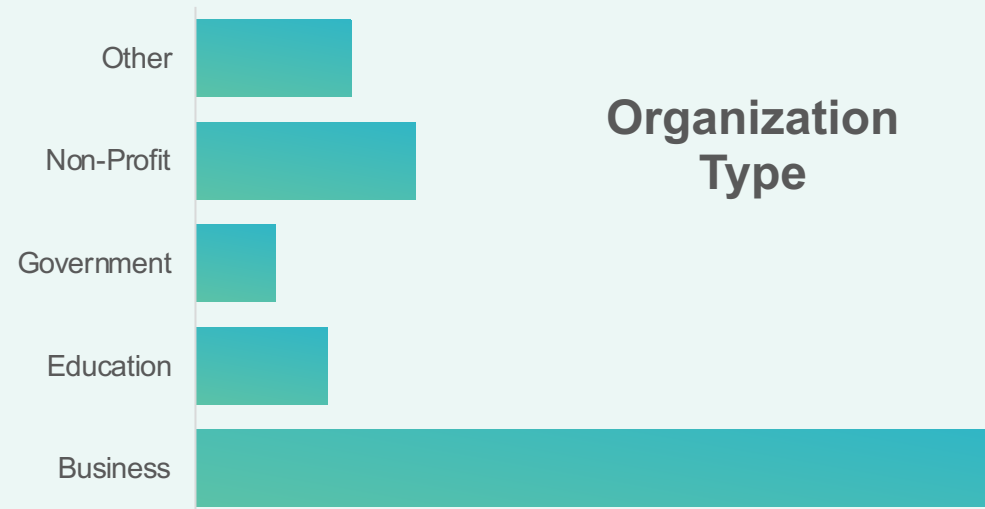
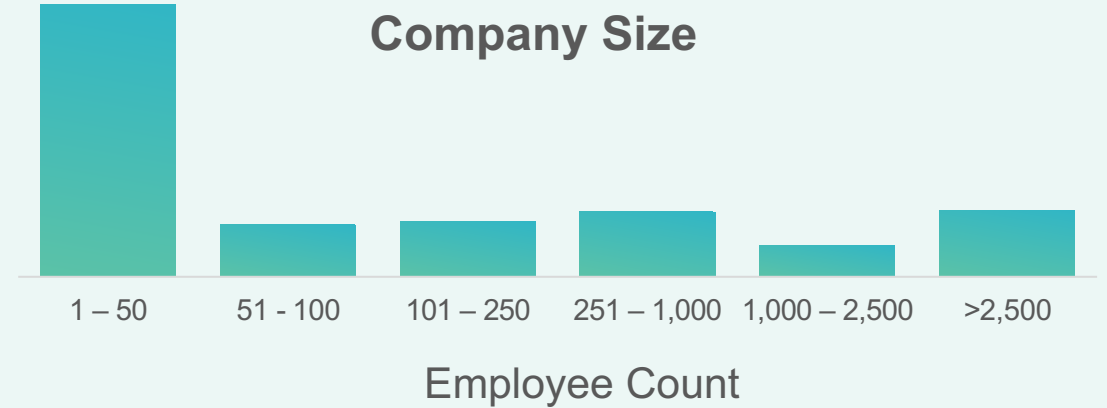
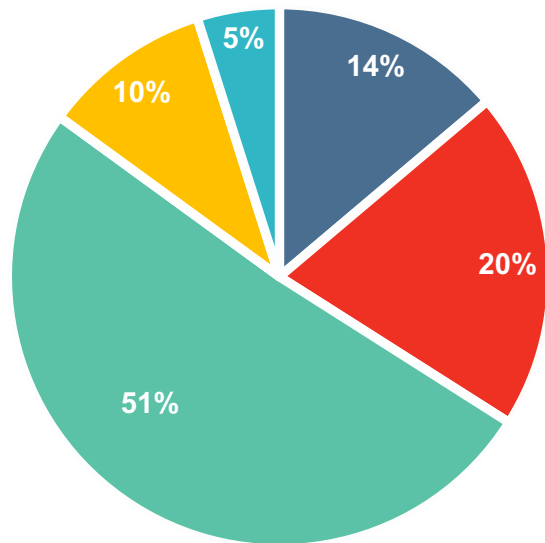
**Workshop a Topic:** a powerful time to share, problem solve and workshop a topic with peers.

# 553 members & counting!

A little background to understand your peers and their background!

## Role In Strategy

- Aspiring strategy leader
- Consultant practitioner
- Executive leader
- Newly appointed leader
- None of the above



ICYMI

# Big, Bold Visions

## Hot takeaways

**Visions are only powerful if communicated clearly.**

Visions are only helpful if you use it to connect your team to your bold direction.

**Buy-in requires busting out of your day-to-day chaos.**

You must bust out of your busy "inbox" and everyday chaos to lead your team!

**Get your vision to 80%, then rock 'n' roll.**

Creating a perfectly worded vision isn't the point!

## Visioning Content

The vision [Master class and visioning canvas](#).

The [full session recording and chat transcript](#).

[The whitepaper](#) on creating a vision statement.

We also have a handy [vision statement cheat sheet](#).

# Our Operating Principles

*When we come together, here is how we operate:*

1

**Give something,  
take something.  
No solicitation.**

2

**Focus on leading  
strategy &  
organization-wide  
impact.**

3

**Confidentiality or  
not. It's your  
choice.**

4

**Keep it positive.  
Be helpful.  
Contribute to the  
greater good.**

5

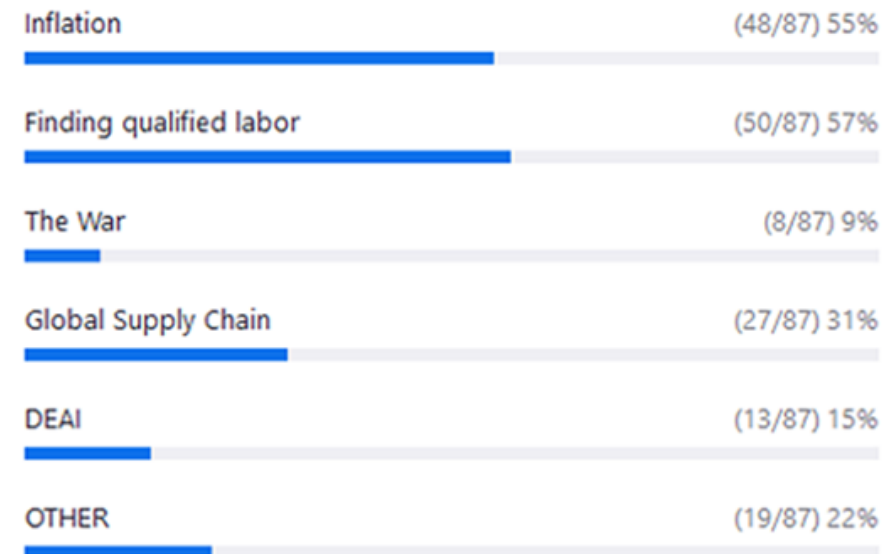
**Be here.  
We get out of this  
what we put into it.**

# From Sept. 1 Collaborative

## What global market factors are on your “strategy” radar?

Poll ended | 1 question | 87 of 111 (78%) participated

87/87 (100%) answered





# Flow for today

01

**Master class:** Approach for Agile Strategy Design & Example

02

**Workshop a Topic:**  
How might we respond to major market dynamics?



# **CSO** *Master class*

## **Approach for Agile Strategy Design**

*Thriving in Volatility*

Idea #1

# Manage a Strategic Issue “Hit List”

01

## Identify Strategic Issues & Opportunities

Keep an active list of items that have the potential to impact long-term performance. Phrase as a question.

02

## “Process” Issues Systematically

Work through researching, solutioning, & deciding.

*How? In your Quarterly Strategy Reviews*

03

## Update your plan to reflect the strategic decision.








Plans should have goals/targets/OKRs for direction that is decided.



*Make this a continuous process.*

# Strategic Issue “Hit List”

Running list of  
issues to address

Issue	Issue Owner	Status
How will we address industry consolidation?	Bob	
Will the war have implications on our cost profile?	Sarah	
Is changing consumer behavior driving commoditization?	Jane	
What is our approach to finding talent for middle management in engineering?	Erica	
etc...		
		
		

Idea #2

# Setup and Monitor Signposts & Triggers

01

**Agility requires “seeing” the dynamic market conditions.**

## **Signposts = Market factors**

Identify several market factors to monitor. (e.g. competitive actions, regulatory announcements, political changes, etc.) – drivers or drags on your strategy.

02

## **Triggers = Leading Indicators**

For each factor, determine if there is a leading indicator or a trigger that if hit, your strategy will be impacted.

03

## **Decide your course of action in advance.**

Know your strategic moves for your triggers.



*Identify 3-5 market factors & trigger points.  
Like KPIs, report quarterly.*

# Example

Signpost	Trigger	Course of Action
Competitive Shift (acquisition, investment)	VC/PE Investment in our sector	<b>Red = \$500M</b> <b>Yellow = \$300M</b>
Regulatory Changes	% of packaging required to be recycled by law	<b>Red = 10%</b> <b>Yellow = 5%</b>
Consumer Behavior > Housing Starts	# of new housing permits	<b>Red = over 3,000</b> <b>Yellow = 2,500</b>
Major Geopolitical Shifts	Cost of gas	<b>Red = \$6/gl</b> <b>Yellow = \$5/gl</b>
<i>Drivers or drags on your strategy</i>	<i>Data that you can report on quarterly</i>	<i>Yellow – Take initial steps Red – Take serious action!</i>

*From...*

**How did we  
perform?**



*To...*

**Should we  
alter course?**



*To...*

**What should  
we do?**



# Workshop a Topic

## Where to contribute?



Chat



Raise Hand



Add to Mural

## How to contribute?

**Set your context** – who are you and what is your organization?

**Share your solution** – that is “stealable”

**Share a resource** – Article, tool, company that has helped



RECRUITING / HIRING TALENT		INFLATION / RISING COSTS	
Approach	Resources	Approach	Resources
<p><i>What are you trying or doing to solve this market dynamic?</i></p> <p>TEST</p>	<p><i>How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?</i></p>	<p><i>What are you trying or doing to solve this market dynamic?</i></p> <p>TEST</p>	<p><i>How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?</i></p>

RETAINING TALENT		DEAI	
Approach	Resources	Approach	Resources
<p><i>What are you trying or doing to solve this market dynamic?</i></p> <p>TEST</p>	<p><i>How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?</i></p>	<p><i>What are you trying or doing to solve this market dynamic?</i></p> <p>TEST</p>	<p><i>How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?</i></p>

[Jump into the Mural here](#)

# Recruiting / Hiring Talent

**Approach:** What are you trying or doing to solve this market dynamic?

*or*

**Resource:** How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?



# Retaining Talent

**Approach:** What are you trying or doing to solve this market dynamic?

*or*

**Resource:** How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?



# Inflation

**Approach:** What are you trying or doing to solve this market dynamic?

*or*

**Resource:** How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?



# DEAI

diversity, equity, accessibility, and inclusion

**Approach:** What are you trying or doing to solve this market dynamic?

*or*

**Resource:** How are you elevating your thinking to solve this market dynamic (article, webinar, podcast)?

# Today's Core Takeaways

## Dos 👍

**Lean into your strategic issue "hit list"** to work through hot or emerging strategic challenges **every quarter.**

Identify and monitor signposts + triggers to **sound the alarm for when it's time to act.**

**Have a course of action** for when the market shifts.

## Don'ts ❌

**Don't cast strategic issues off to the side** to be reviewed every year.

**Don't just "look back"** to review your plan. It doesn't help create the future.

**Miss the market** by not having a clearly identified leading and lagging indicators.

# CSO Collaborative Programming Calendar!



## Growth Frameworks

### **Deep Dive: Building an Adaptable Growth Framework**

1st Thursday @ 8 a.m. PT  
October 6, 2022

### **Workshop: Sales & Marketing Strategies to Fuel your Growth**

3<sup>rd</sup> Thursday @ 8 a.m. PT  
October 20, 2022



## OKRs

### **Deep Dive: Are your OKRs masquerading as strategy?**

1st Thursday @ 8 a.m. PT  
November 3, 2022

### **Workshop: How to do OKRs if you are not Google?**

3<sup>rd</sup> Thursday @ 8 a.m. PT  
November 17, 2022

Connect with us so we can highlight you on one of these upcoming calls.

Email [Collaborative@OnStrategyHQ.com](mailto:Collaborative@OnStrategyHQ.com)

# CSO Collaborative

Final thoughts



## See you Thursday, Oct. 6 @ 8 a.m. PST

Be sure to reserve time on your calendars if you haven't already.



## Expect today's content in your inbox

We'll email by tomorrow with links to resources we talked about.



## Suggestion for topics? Feedback?

Drop us a line anytime – let us know what you think and what you'd like to tackle as a group.

[collaborative@onstrategyhq.com](mailto:collaborative@onstrategyhq.com)