

CASE STUDY

LOST IN THE DARK



A Case Study in Setting Direction without Context

The Strategic Dilemma:

New leadership and a stalled strategic planning process presented a challenge and an opportunity.

An opportunity for the organization's new leadership to influence the strategic direction before it was set. And a challenge to enroll those already invested in the current strategic planning process to see the value in taking a few steps back to make big leaps ahead.

Within their first months, the new leadership team assessed a gap in the current strategic thinking that made it seem like

The Engagement and Our Approach:

Focused Momentum[®] (FM) was engaged to work with the new CEO, new COO, new Board President, and the legacy planning committee to redesign the strategic planning process addressing its gaps and stay with the current planning timetable.

The goal was to identify the areas where for more in-depth analysis and broader context was needed and conduct a strategy development session that allowed ALL stakeholders (new and legacy) to understand and digest the market realities and trends that could impact future success. The complexity of this challenge grew because the client operated in at least three distinct market sectors.

Using our Strategic Focus Market Mapping process, the

Results:

Our engagement led to a significant shift in strategic thinking for the new strategic plan.

The most substantial implication was to form a new entity to address challenges and opportunities for one market sector. With this new entity separated from the core organization, it enhanced their ability to compete against larger peers and to

the organization's long-range planning was lost in the dark. It lacked an external perspective and a proper market context to evaluate planning priorities. If they completed the plan as it was, they knew they would have to change some of the core assumptions within the first year.

How could the organization confidently set a new direction without an understanding of how it related to the market they were striving to serve?

FM team led three separate market sector teams to define and research each market and its dynamics. This analysis included creating a way of viewing the market (the map) and where competitors or partners played in it. Each market mapping presentation included an evaluation of where the client operated today and its relative positioning to others in this market.

During the two-day Strategy Creation Session, each market map was reviewed, and strategic priorities were set for each market segment. This context clarified the challenges the organization faced and provided new insight into the planning priorities for each market area.

improve the organization's ability to deliver on the broader mission.

This new direction paid off as significant funding was secured to establish the new entity, and its visibility has enhanced the reputation of the entire organization and its impact on the broader mission.