

Summary and Worksheet

This you can see as the 'emergency toolkit'.

1. What area are we analyzing?

- What business, organization?
- What product/service, market, channel, customer segment, division, country...? Don't filter out too much as adjacent areas may be influencing the key area of analysis.

> Write down the area of analysis.

2. Current and Future Goals

- What are the **Goals** and Objectives? In the Present and Future.
- What is the immediate goal?
- What is the goal in the future?
- What does success look like (End in Mind)?

> Write down the goals.

3. Observations.

- What do you initially **observe**?
- What sticks out after a first review (reading reports and articles, interviews, studying a case, listening to customers, looking around, talking to people at different levels in and outside the organization...).

The problems but also the positive observations, those elements to keep and strengthen.

> Summarize the top observations.

4. Rank Issues

- What are the **issues** to reaching the goals?
- Link the observations to the goals and define issues.
- The observations go in 2 lists: “Current” and “Future” state(s).

- Divide these lists in:

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Observations of strengths or opportunities: keep strong/positive.	Observations of weaknesses/threats and other issues and barriers that need to be addressed: 1. to stay in place and 2. to make progress towards the goals.

Don't move from “stay in place” phase too fast. Many organizations have run into serious problems because they focused too much on the future but didn't safeguard the current position.

5. Design Actions to address issues.

- Strategy is a series of **Actions** to reach Goals. In the Present and Future “resolving” the issues, crossing the barriers.

3 actions to stay in place?	3 actions to reach the future goal?
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6. Agree and Document.

- Summarize: Issues, barriers, and actions by who and when on one page.
- Bullet points. Elevator speech ready. Define what next.
- Indicate what, who and when and an indication of value.

> Initial, high-level strategy.

Continue with the **next round** if you have time (see Tools and Techniques)

Second Round Strategy Review

- What do you now **observe**, what is triggering your mind with what you have learned so far and using tools and techniques and viewpoints, “looking through different glasses”?
- 6Ps, SWOT, 5 Forces, 7S, ...
- Looking at the area as marketer, CEO, minister, lawyer, financier, production-manager, citizen, farmer, patient...
- Issues, barriers, questions...
- Keep observing until you start getting “repeats”. Once you don’t see, hear, read... anything ‘new’ you may have done enough (or you may need a different observer to make sure you have not been blindsided or missed something).
- Step back, take a walk and reflect on what first comes to mind as an **overriding, bigger issue, or context**. This may change over time. Keep track of the changes and the reasons the key issue changes.

6 STEPS Again