



How to Facilitate a Strategy Workshop

A key skill for any business consultant working with a top team is the ability to help them clarify and define their strategy. This strategy will then inform decisions about what to focus on, how to organize work, where to prioritise spend.

1. Opportunities, Threats and Risks

As a starting point, focus on the external factors facing the business or part of the business you are working with – that is, what are the opportunities, threats and risks to the business? An example might be a change in mortgage lending which presents an opportunity for your business as a property developer. Or it could be a major home builder moving into your geography which directly threatens your business. This should be done as a brainstorm exercise to encourage as much contribution and engagement as possible.

After this, prioritise each issue using a 2 x 2 matrix with “What is potential likelihood” on the vertical axis (low to high) and “How relevant is it?” (low to high) on the horizontal axis.

Once the highly relevant issues which have a high potential of occurring (that is, the top right hand corner of the matrix) have been prioritised by the group, discuss each in terms of:

- What is it?
- How relevant is it? Why is it relevant?
- What is the potential likelihood?

2. Strengths, Weaknesses and Gaps

Now move to the internal factors impacting the business. Brainstorm the significant internal factors facing the business or part of the business. An internal strength might be the technical skills of your team or your well established sales processes.

Next, prioritise each factor again using a 2 x 2 matrix with the “How strong or weak” (low to high) on the vertical axis and “How important is it?” (low to high) on the horizontal axis.

Once the important, ‘strong’ factors have been identified discuss each in terms of:

- What is it?
- Why is it relevant?
- What is its’ potential impact?

The first two steps are very like a SWOT analysis except that each factor is prioritized and each of the top priority factors discussed. This discussion enables the team to share their concerns and expectations for the future, something which gets missed if you merely brainstorm.



3. Critical Success Factors

After the prioritised SWOT focus on the critical success factors, that is, what must we as a business get right over the next 2 to 3 years to be successful. At this stage, to ensure that the focus is still a strategic one, it is important to address the external threats and opportunities (that is, step 1) when thinking about the CSFs.

After brainstorming, discuss each CSF – why people see it as important and the implications to the business of each. After the discussion undertake a prioritisation exercise such as nominal group technique (NGT). NGT usually consists of allocating 3 votes to each individual and they are free to allocate those votes as they see fit. They can allocate 3 to one factor or distribute one vote for each of three factors.

4. Values

A critical component of a strategy workshop must also address 'how' people will work together, not just what they will work on. Where the CSF's are aligned to the external factors, the Values tend to be aligned to the internal factors (no. 2). These values are what will unite a group and keep them intact during difficult or stressful times.

To do this, brainstorm the following question: "in your opinion, what must we value (believe in) as a business to achieve this success?"

Discuss each value:

- What does this mean?
- Why is it important?
- What does it look like? – how would you role model this to others

Agree and prioritise the top half dozen or so values using a prioritisation technique such as NGT.

Ask the group, how do these values match current values? What do we need to do differently to achieve these values?

5. Key Organisation Design Criteria

As part of a strategy workshop it is important to think through how resources should be organised to exploit opportunities, fight off threats from competitors and make best use of our strengths. Although designing an organisation usually requires technical expertise in job design, the responsibility for defining what type of organisation we want to create and work within belongs with the top team.

Brainstorm the following question: "in your opinion, what are critical organisation design issues re structure, processes, roles, performance management, reporting etc?"



At this stage it is important to think about the ideal future organisation and not the existing organisation. Think about the major work processes and how this work should be organised – eg if we need to be more customer focused should we organise our sales teams around our major customers and their concerns.

Discuss each criterion:

- Why?
- Implications?

Prioritise as necessary, finding the show stoppers or key enablers.

6. Key Strategic Drivers

As a summary, ask the following question: “What are the 2 to 4 key strategic drivers for the organisation over the next 2 to 3 years?”

This is best done in silence as it gives individuals a chance to reflect over what has been before – the SWOT, the CSFs, the Values, the Organisation Design criteria.

- List everyone’s first driver, then discuss implications
- List everyone’s second driver, then discuss.

Generate a summary statement: shared view of objectives (goals) over next 2 to 3 years by the individual or as a group.

Pam Kennett
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