## Strategic Engagement Process

*Bringing out the best in people...*

### Exploring
- Planning & Assessment
- Gathering Input
- Engaging Key Stakeholders
- Gathering Points of View From Different Levels and Functions
- Identifying Themes & Patterns

### Gaining Focus
- Engaging Key Themes
- Determining the Critical Few
- Charting the Road Forward
- Defining Outcomes, Success
- Determining Metrics & ROI

### Taking Action
- Action & Implementation Teams
- Process Redesign
- Strategic Planning
- Leadership Alignment & Skill Development
- Engaging & Reconciling Key Dilemmas

### Impact & Results

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### Evaluation & Course Correction
Exploring

Activities

Planning & Scoping
- Define objectives & success
- Determine scope
- Decide who to involve
- Create timelines

Gathering Data
- Surveys
- Interviews
- Focus groups
- Large group processes

Making Meaning
- Analyze Data
- Identify Themes & Patterns

Executive Briefing

Outcomes

Identify organizational strengths & limitations

Take the pulse of organizational culture and mood

Identify key themes for further exploration & action

Guiding Principles

- Focus on what works
- Strive to gain clarity
- Identify actionable issues
- Surface underlying challenges & dilemmas
- Involve a range of people and perspectives to get a broad, complex view
Gaining Focus

Activities

- Engagement sessions with leaders & relevant other levels
- Report themes
- Explore through dialogue
- Gain new perspectives
- Agree on critical few

Outcomes

- Short list of strategic & immediate actions
- Leadership & organizational focus & alignment
- Collective commitment to action

Guiding Principles

- Report back data to all who provided input
- Drive for engagement & make the conversation real
- Gain agreement on a critical few actions
- Chart next steps
- Define milestones & metrics
Taking Action

Sample Activities and Focus Areas

**Leadership Alignment**
- Enhance organizational focus
- Increase collaboration across functions

**Action Teams**
- Explore, plan & implement improvements

**Process Redesign**
- Gain efficiencies & streamline work

**Leadership Development**
- Build a pipeline of leaders
- Key competencies & behaviors
- Action learning programs
- Leadership development systems

**Strategy Development**
- Strategic and business plans, new business models, markets and service

**Culture Change**
- Organizational lifecycle shifts
- Identify & operationalize values
- Explore & change relationships & information flow

**Guiding Principles**
- Refine key success factors to guide implementation
- Monitor implementation and make course corrections
- Conduct after action reviews to ensure organizational learning
- Reward and celebrate progress and results

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