

Strategic Engagement Process

Bringing out the best in people . . .



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

