



CASE STUDY STRATEGIC PLANNING WORKSHOP

PREPARED BY

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Strategic Planning Workshop for Executives

Challenge

The client, a mid-sized, privately held architectural and engineering firm, was in the midst of significant changes to its executive leadership. There was a lack of shared vision and direction. The client requested a workshop to bring together eight participants from ownership and the C-Suite, to align on a shared vision and to solve four specific issues:

- A CEO and ownership transition
- Challenges aligning around the role of COO and the responsibilities of that position,
- Difficulty hiring and retaining top talent,
- Unsustainable workloads and difficulties delivering work that met quality and schedule expectations.

Solution

To address the issues, we designed a participant-centric approach to problem-solving using appreciative inquiry and action learning. The approach included discovery interviews, a two-day workshop, and an executive summary report.

The discovery interviews allowed us to meet each participant in advance and hear directly from them what they hoped to achieve during the workshop and their most significant concerns.

The discovery interviews informed the design of the structured, two-day offsite workshop where we led the participants from vision to action.

The two-day workshop included four broad focus areas: vision and values, leadership roles, tactical problem solving, and leadership norms. The agenda allowed us to adjust as we sensed the participants' level of engagement, capability, and willingness.

First, we facilitated a discussion related to a long-term vision and corporate and personal values.

Second, we conducted a roles and responsibilities exercise, in which all participants were able to voice their expectations of each of the leadership roles.

Third, we introduced a fast-paced approach to complex problem solving and guided the group through solving real issues.

Fourth, we clarified the leadership norms and practices that they all agreed were necessary for their future performance.

We adjusted the last day to add a dedicated discussion on messaging because they identified this as a root cause of many of their tactical challenges.

Outcome

The workshop results were summed up by one of the participants, who said, "we were all on the same page; we just didn't know it."

At the end of the workshop, the incoming CEO expressed his willingness to take on the new role and designed a practical succession plan for his current role. All participants publicly supported this plan.

Participants had open and honest dialogue regarding the COO role, and they clarified their expectations of the COO. The incoming CEO committed to working more closely with the COO.

The client adopted the problem-solving techniques we introduced as a way to improve their own meetings.



ABOUT

Founded in 2016, Rev Ø Consulting provides organizational development services to project-based organizations. Our expertise and knowledge of project execution best practices provide our clients with the resources necessary to achieve their project goals and get their project teams functioning at a high level.