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Getting maximum impact from your next strategic planning process

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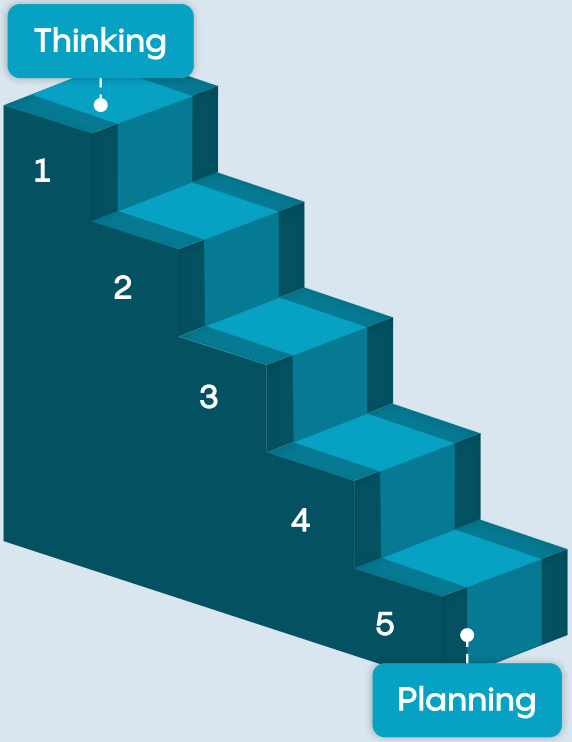
Strategic thinking before strategic planning

BY DR MARC LEVY



A strategy without a plan is too conceptual. A plan without a strategy is hollow. What is your strategy and what does it mean for what you are actually going to do?

Timeless strategic questions (strategic thinking), which resonate with our clients , must be satisfactorily answered 'upstairs' before clients move 'downstairs' to strategic planning.

Strategic plans should comprise strategic objectives and attendant measures, priority initiatives and a measurement monitoring and review cycle.

At Strategic Facilitators we are often asked about our definition of strategy, and in particular about the difference between setting a strategic direction and strategic planning. Watch this short video to learn about our approach.

CLICK TO WATCH VIDEO

Helping clients with their strategy and planning processes is a major part of our practice.

This year our firm will help nearly 50 organisations with their annual strategy and planning cycles – conducting analysis, taking executive teams and boards offsite, documenting strategic plans, and assisting them with implementation, measurement, monitoring and review. I've personally helped more than 100 organisations with their strategy and planning work over 20 years.

In this work we are frequently asked about the interplay between strategy and strategic planning. Are they the same thing or not? There is a rich body of literature on this topic, typically lauding adaptive strategy development and lampooning rigid strategic planning.

We have a different view about the value of planning, and the confluence and complementarity of the two disciplines. A strategy without a plan is too conceptual. What does the strategy mean for what you are actually going to do? It is certainly possible to draft a strategic plan having paid little or no consideration to central strategic questions like where are you going to compete and how are you going to win. However, a plan without a strategy is hollow.

Our work in this area is inspired by leading international strategy academics and practitioners, like Jeanne Liedtka (1998), Ken Favaro (2013), Roger Martin (Lafley & Martin, 2013) and Robert Kaplan and David Norton (2008).

Exhibit 1 (next page) makes the distinction between strategic thinking and strategic planning. As it shows, the former tends to be more divergent, creative and synthetic and the latter more analytical, convergent; the former can disrupt an organisation's agenda, the latter align it.

We centre our strategy work with clients on a handful of strategic questions. We've written about strategic questions before (refer to Article 4 sidebar: Ten strategic questions you need to ask). As shown in exhibit 2 we sometimes employ Roger Martin's strategic questions (2012) to focus clients' strategy development efforts.

These timeless strategic questions, which resonate with our clients, must be satisfactorily answered 'upstairs' before clients move 'downstairs' to strategic planning, the elements of which are perhaps best reflected in the work of the creators of the balanced scorecard, Robert Kaplan and David Norton (1998). Their work suggests that strategic plans should comprise strategic objectives and attendant measures, priority initiatives and a measurement monitoring and review cycle.

The strategy development should precede the planning; because, for example, you can't make a good fist of initiative prioritisation and resource allocation unless you've 'been granular' about where to compete (Bradley et al 2011). Equally, there's not much point creating a galvanising aspiration if you can't action it.

We frequently tell the story of a healthcare client who identified seven distinct customer cohorts as equally important. This was not a recipe for focus and the client needed to think through prioritisation of these customers, before it could start on objective setting.

We are not the first to make this observation about the distinction between strategy and planning. Ken Favaro (2013) makes a similar point in his work on the 'strategic five' and the 'corporate five'.

However, much of the literature unhelpfully sets strategy and planning up as a trade off or dichotomy. We believe that they are necessarily complementary and entwined.

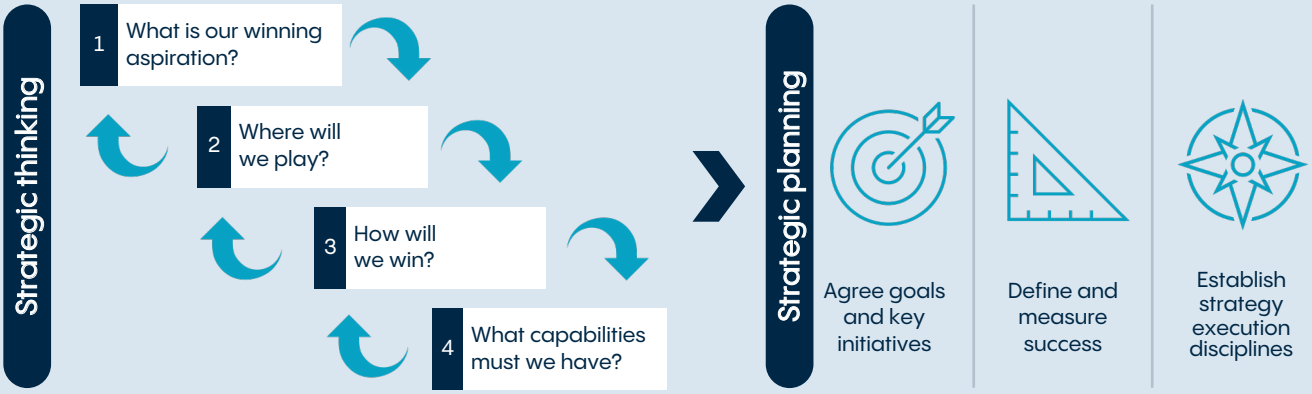
Exhibit 1

Strategic thinking and strategic planning

Source: Adapted by Right Lane Consulting from: Heracleous, L. (1998). Strategic thinking or strategic planning. *Long Range Planning*, *31*(3), 481-487.; Liedtka, J. (1998). Linking strategic thinking with strategic planning. *Strategy and Leadership*, *1*, 120-129.

Exhibit 2

Strategic questions



Source: Right Lane Consulting. (2017). (strategic questions based on Lafley, A., & Martin, R. 2013)

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The value of a robust diagnosis

BY DEBBIE WILLIAMS, ABHISHEK CHHIKARA AND DR MARC LEVY

Be better prepared for next year's strategy and planning process

Undertaking robust analyses of what's happening in the world, the industry, and within organisations, is critical for clients to build an evidence base and a common reference point to draw upon when engaging in strategic thinking and strategic planning. We suggest that clients adopt a diagnostic approach that sorts data into patterns, and replaces the overwhelming complexity of reality with a simple story from which levers for action can be identified.

In the previous article (Strategic thinking before strategic planning) we described our approach to strategy development. It involves asking unassuming but challenging strategic questions like:

Where will we compete? How will we win? and What capabilities do we need to build? (Levy, 2016). We ask clients to spend time 'upstairs' thinking about these questions, and, only when they've been satisfactorily answered, 'move downstairs' into strategic planning discussions covering goals, measures and priority initiatives.

This sequence is shown in the chart on the next page.

While these two steps are critically important they are generally not sufficient. Preceding strategic thinking and planning – which frequently comes to a head at board and executive team strategy offsites – we encourage clients to undertake robust analyses of what's happening in the world, their industries and their organisations, so that they have an evidence base and a common reference point to draw upon.

This sounds obvious enough, but over hundreds of strategy and planning engagements we've found that it's common for the analysis phase to be foregone or given short shrift. Leaders don't always see the value in it. Why? Only recently one of the exec team has done some strategic analysis; a consulting firm's report includes a section on industry analysis; an external report or some market research traverses some of the ground; leaders may believe that their senior teams already know what they need to know.

This reminds us of an Indian parable of four blind men walking through a forest who come across an elephant. Each blind man feels a different part of the elephant's body and describes the elephant based on their experience. One feels the trunk and describes it as a snake, another feels a leg and describes it as a pillar. What happens next depends on who is telling the story.

In some versions, the men suspect the others and come to blows. In another version, they stop talking, start listening and collaborate to 'see' the full elephant.

Richard Rumelt, in his book Good strategy, bad strategy, calls this analysis a diagnosis and notes that 'an especially insightful diagnosis can transform one's view of the situation, bringing a radically different perspective to bear'. And with radically different perspectives can come different opportunities.

Consider these recent examples from our work:

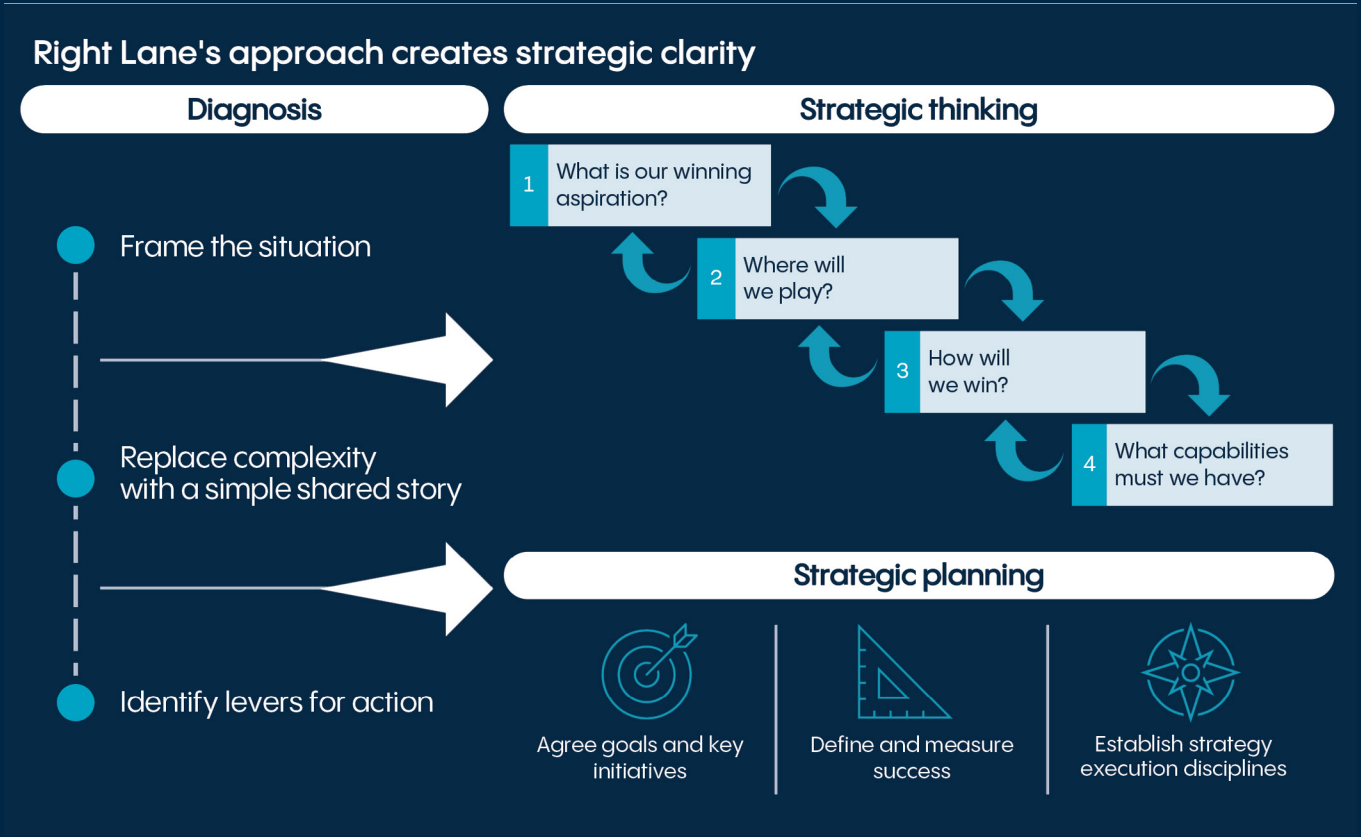
- A financial services organisation realised that taken for granted assumptions about the demographic profile of its membership were incorrect, leading to a reappraisal of its marketing programs.
- A representative organisation identified that its growth would come from industries and member cohorts that it was not explicitly targeting.
- A government enterprise discovered that long-term trends in its financial performance gave it less time to change its business model than it previously thought.
- A deeper understanding of a retail business's stakeholder intentions led to a change in the way it framed its strategic options.
- A facilities manager came to the conclusion that its prospects would be enhanced by privileging one type of customer over another.

We encourage clients that are unsure of the merits of a diagnosis to consider these questions:

- Is there an opportunity to identify a handful of hitherto unknown, strategically material insights among the overwhelming morass of analysis that is typical within organisations today?
- Will everyone bring the same understanding of the organisation's performance and health (Davis, 2005), situation and prospects to the strategic thinking and planning discussions?
- Does the organisation have a contemporary 'house view' about how changes in the world will impact the organisation and its business model?

We suggest that clients adopt an evidence-based approach to discussing the elephant in their boardroom. One that links data into patterns, and replaces the overwhelming complexity of reality with a simple story from which levers for action can be identified.

'... an especially insightful diagnosis can transform one's view of the situation, bringing a radically different perspective to bear.'



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Strategic foresight that's grounded, disciplined and built for action

BY DR MARC LEVY

Strategic foresight is having a moment. Across sectors, leaders are scanning the horizon for signals of disruption, commissioning trend reports and running scenario workshops. That's understandable: disruption cycles are shortening, risks are increasingly interconnected, and long-held assumptions are being tested more often.

But foresight only earns its keep when it changes decisions, when it sharpens strategy, informs posture and strengthens an organisation's ability to deliver on its purpose in a shifting world. Too often, scanning becomes a catalogue of trends or a list of things to watch, disconnected from the choices leaders need to make. The result is familiar: interesting insights, unclear implications.

At Strategic Facilitators, we treat horizon and environmental scanning as a discipline of organisational sense-making. Our objective is to help clients build a structured, repeatable approach to identifying, interpreting and prioritising external drivers of change, so they can be as prepared as possible for trends and events that might shape their futures. This article outlines the perspective we bring to foresight projects and how we make scanning a source of actionable intelligence.

Why scanning matters now

Every organisation operates within a wider system: social, economic, political, technological, environmental and market forces that shape what is possible. Those forces interact, and sometimes shift quickly. Policy and regulatory settings change the rules of the game, evolving stakeholder expectations shift priorities, new technologies reorder industries, and climate risk is testing the future viability of places and economies.

In this context, strategy can't be fixed. It must be a living response to a dynamic environment. Strong organisations anticipate change early, make sense of what it means for them, adjust posture before risks bite or opportunities pass, and stay anchored in what they exist to deliver.

Strategic foresight supports this. It builds a forward-looking evidence base, helps leaders see around corners and creates the confidence to move before it's too late. It is not a prediction: the future is of course complex and uncertain. The point is to widen what leaders consider plausible and to prepare them to respond with intent.

Our framing: scanning as organisational sense-making

Scanning is a family of activities with different purposes, so clarity about what each contributes matters. They may frequently be used interchangeably; but are not synonymous.

Our framing rests on 3 interrelated disciplines:

1. **Environmental scanning —** identifying and monitoring trends and drivers of change in the external environment.
2. **Horizon scanning —** spotting early signals and potential discontinuities that are not yet widely recognised.
3. **Strategic foresight —** integrating these insights into coherent views of alternative futures and their strategic implications.

Together, these disciplines provide structure. Environmental scanning gives visibility on known forces. Horizon scanning focuses attention on emerging shifts at the edges. Strategic foresight connects both to strategic meaning and action.

The relevant academic literature informs our practice (for example, Choo, 2001; Hiltunen, 2006, 2008; Ramirez & Wilkinson, 2016; Voros, 2005; Weick, 1995). Taken together, this work reframes scanning not as the passive accumulation of information, but as an active capability, a connected chain that links sense-making, analysis and strategic decision-making.

Other key themes include:

- Privileging interpretation and meaning over the indiscriminate accumulation of information.
- Building organisational capacity to interpret ambiguous cues and anticipate their potential implications.
- Treating outward-looking attention as a sustained organisational capability rather than a one-off task.
- Distinguishing among different kinds of signals, including stable trends, weak signals of emerging change, and genuine wildcards – events with no clear precursors.
- Applying scenario planning disciplines to reframe strategic contexts, test underlying assumptions, explore options, and design moves that are robust across alternative futures.
- Being conscious of limitations regarding what we can really recognise, analyse and know, and the extent to which we are prepared to lean in to acquire the knowledge needed.

Our objective: bring a deeper understanding of what's changing and what it means for our clients

Our objective in foresight work is to establish a structured and disciplined approach that identifies, interprets and prioritises external drivers of change so they inform strategy, risk appetite and organisational posture. The goal isn't to produce a list of trends; it's to clarify:

- what forces are most likely to shape the organisation's ability to deliver on purpose and ambitions
- which of these are most material, and why
- what do they imply for what an organisation could and should do
- what should be acted on now, monitored or prepared for.

This is where conviction and flexibility meet. Conviction comes from clarity about purpose and mandate. Flexibility comes from an honest reading of the environment and a willingness to adapt posture as signals strengthen.

Our process: from broad scanning to actionable intelligence

Each project is tailored, but we follow a consistent logic that moves from breadth to focus and from insight to action.

1. Establish the mandate and scanning frame

We start by grounding the work in context: strategy horizon, operating environment and current uncertainties. We clarify the decisions scanning should inform, the system boundary, and how the work connects to existing strategy and risk processes.

2. Build the broad view: environmental scanning

We develop a structured picture of external drivers across relevant domains (social, technological, economic, environmental, political, market), using a systems lens rather than silos. We focus on forces with plausible pathways to impact on purpose, strategy or operating model, and/or the broader stakeholders environment, avoiding a 'trend-dump' in favour of materiality.

3. Look to the edges: horizon scanning

We then search for early indicators and less obvious shifts, weak signals and potential discontinuities that could reconfigure the environment over time. This includes emerging technologies or business models, early policy experiments, shifting community expectations, geopolitical or scientific inflection points and innovations from adjacent sectors. The aim is to widen the space of possibility and notice what might otherwise be missed.

4. Interpret and cluster

We work with clients to test plausibility and cluster related drivers. We focus on interactions between forces to observe systematic effects, feedback loops and potential tipping points, shifting the work from 'what's happening?' to 'what patterns of change could shape our world?' The ground is most fertile here, where uncertainty is highest, where multiple forces interact, assumptions can be fragile, surprises are more likely and small differences in interpretation can lead to profoundly different paths.

5. Prioritise materiality

Using a framework centred on alignment to relevance, potential impact and uncertainty, we narrow to a manageable set of priority forces for deeper investigation. This keeps attention on what is strategically material, not just interesting.

6. Translate to strategy and posture

We turn priorities into implications for direction and posture: what this means for strategic choices, risk appetite and capability investment, along with indicators that should trigger action.

Where useful, we explore scenarios built around key uncertainties as a disciplined way to test robustness.

Our design principles

Foresight work must balance rigour with practicality. We use a set of design principles to guard against common pitfalls:

Tailored to the mandate. The approach is custom-built to support specific decisions and the required timeframes.

1. Future-oriented. We look beyond what's impacting now to plausible trajectories.
2. Selective and disciplined. Clarity and relevance beat exhaustive coverage.
3. Coherent narrative. Insights are connected into a story about what matters and why.
4. Designed for impact. Outputs are compelling tools for decision-making, not dull inventories of trends.
5. Built for implementation. Translation into strategy and action is designed in from the outset.

These principles keep scanning grounded in the reality of leadership choices: they help organisations interpret external change in ways that ballast purpose and sharpen readiness for what comes next.

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Note: The reflections in this article come from working alongside clients on hundreds of environmental analyses and many scenario planning exercises, always with a focus on translating trends and forces into insights that support strategic decision making. The drafting process was supported by OpenAI's ChatGPT.

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Where to play and how to win

BY DR MARC LEVY

- A recent focus in many of our strategy workshops has been to consider two important strategic questions:
  - » Where should we compete?
  - » How will we win there?
- This approach to strategic thinking gives rise to interesting, engaging and ultimately useful strategic discussions at the executive team and board level.

In our work we help clients with strategic thinking and strategic planning. The thinking part is frequently informed by a series of strategic questions: Where will we compete? What is and will be our distinctive value proposition? What capabilities do we need? (see 'Ten strategic questions you need to ask' on the next page).

We've recently worked with several clients on two strategic questions in particular: where should we compete and how will we win there. These questions were popularised by North American strategy academic Roger Martin (2013).

We've adopted and adapted what we think is the best of the academic frameworks relating to where and how an organisation competes and combined it with our own thinking.

Our focus has been on how to work with clients in workshop settings to answer these simple but profound questions.

We've come up with what we believe is a simple and galvanising method. It centres on:

- working hypothesis about where we compete or scope and continua that force scope choices; and
- a set of differentiation dimensions, that go to how an organisation will compete, and the activity system required to support differentiation.

This approach gives rise to interesting, engaging and ultimately useful strategic discussions at the executive team and board level.

Where will we compete?

We start with a discussion with the CEO regarding scope. What are her or his 'working hypotheses' about where the organisation will compete and win – which customer groups, which products, which geographies? What is in and what is out of scope? What are the implied shifts?

The second technique we use is to make explicit what that means the organisation will do and definitely won't do. Our US colleague Bob Frisch (2012) calls this walking the walls and fences. 'Walking the walls and fences' entails 'collectively testing and affirming the boundaries of an organisation's business model.'

'Walls are the boundaries around any business that are assumed to be immovable. But by challenging these assumptions, teams can discover that walls are sometimes fences—boundaries that can in fact be moved if there's a compelling reason to do so, opening up strategic space…'

How will we win there?

Differentiation can be a loose baggy monster. And it can be particularly challenging to have beneficial discussion about it in a workshop setting. We have found that a two-part framework derived from the work of Harvard academics David Collis and Mike Rukstad (2008) and Michael Porter (1996) can be helpful.

Collis and Rukstad suggest that the 'complete definition of an organisation's competitive advantage (or uniqueness) consists of two parts.

'The first is a statement of the customer value proposition. Any strategy statement that cannot explain why customers should buy your product or service is doomed to failure. A simple graphic that maps your value proposition against those of rivals can be an extremely easy and useful way of identifying what makes yours distinctive.'

Prior to workshops, we ask participants to consider a set of potential differentiators such as price, service, brand affinity and customer intimacy. For each dimension where are they now and do they think they should and could be in future – behind peers, meeting the market, ahead of peers or distinctive? We've found that executive teams and boards derive great benefit from surfacing and discussing different perspectives and working towards a handful of specific bases of differentiation.

But identifying bases of differentiation is only part of the answer. As Michael Porter points out competitive advantage is a function of many complementary, reinforcing activities. Accordingly 'the second part captures the unique combination of activities allowing that firm alone to deliver the customer value proposition.' According to Porter, 'Activity-system maps show how a company's strategic position is contained in a set of tailored activities designed to deliver it. In companies with a clear strategic position, a number of higher-order strategic themes can be identified and implemented through clusters of tightly linked activities.'

We work with clients to elaborate the specific bases of differentiation derived from the previous exercise (the higher- order strategic themes) and then to identify the clusters of tightly linked activities that support them.

Strategic thinking precedes strategic planning. We've found that being strategic about where and how an organisation competes – that is, its scope and differentiation – is a highly engaging and valuable precursor to strategic planning discussions about objectives, measures of success and initiatives.

Ten strategic questions you need to ask

1. **Why do we do what we do? What's the problem or opportunity in the world with which we are engaging?**
2. **Who are our primary customers?**
3. **What do we want to be famous for?**
4. **Where will we compete, specifically?**
5. **What is our winning move/s?**
6. **How will we add value to our stakeholders?**
7. **How does our strategy rest on insight that only we have?**
8. **How does our strategy put us ahead of the market?**
9. **What capabilities do we need to be successful in the future?**
10. **What could a competitor do to hurt us?**

For full article including references visit the Strategic Facilitators website **HERE**

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Unlocking the potential of Board Strategy Days

BY DR MARC LEVY

Board Strategy Days (BSDs) are vital for aligning boards and management teams on strategic priorities. Their success hinges on thoughtful design, harnessing different perspectives, proven methods and skilful facilitation. Effective BSDs prioritise interactive discussion over presentations, encourage co-creation between directors and management, and ensure all voices are heard—unlocking clarity and cohesion, and creating strategic momentum.

BSDs are pivotal moments for boards to deeply engage with an organisation's strategic direction, align on critical priorities, and reinforce collective decision-making. When well designed and facilitated, BSDs can become powerful forums for driving clarity and momentum. However, achieving this impact demands careful forethought and a nuanced understanding of board dynamics.

Based on my experience of nearly 250 BSDs, this article offers practical insights and proven recommendations for planning and executing them effectively.

Strategic context and alignment

Board directors are acutely aware of their legal and practical responsibility to review, challenge, approve, and oversee strategy. This is one of their two or three most critical duties. As such, directors frequently seek to explore strategic objectives, medium- to long-term priorities, and risk considerations during BSDs, even when this might not align perfectly with the organisation's planning calendar.

Many directors bring with them preferred strategic frameworks or mental models, such as 'where to play/how to win', generic strategies, or performance measurement methods. They often want assurance that such approaches are addressed meaningfully across the planning cycle.

A key challenge lies in the misalignment that can exist—among directors, and between the board and management. Topics like external trends, opportunities, and emerging challenges often surface divergent views. Executives, immersed in day-to-day operations, may underestimate the board's desire to explore these themes at length.

This diversity in perspective can, if harnessed well, enrich strategic dialogue. At one of our financial services clients, for instance, directors brought distinctly different 'entry points' to strategy: one emphasised industry analysis, another leaned on long-term actuarial projections, and a third focused on articulating strategic intent. Rather than forcing convergence too early, we encouraged the board to embrace this diversity, turning it into a source of strategic richness, not confusion.

Agenda design and planning

Well-designed BSDs orient directors to the organisation's strategic context and planning rhythm. Key questions often addressed upfront include: What is our current strategy? How do we approach, set, and monitor strategy? Where are we in the strategic planning cycle? How appropriate is our current strategy in light of evolving conditions?

Rushing through a packed agenda is a common pitfall. Most BSDs we facilitate feature three or fewer formal presentations. The majority of time is intentionally allocated to structured group discussions and collaborative exercises, supported by thought-provoking pre-reading materials. Directors value sessions that allow for substantive, unharried conversations. This can feel uncomfortable for management, but needn't, when planned intentionally.

Directors can get frustrated if they feel overly 'managed' or circumscribed by management. Chairs always, and directors generally, want to be (at least) consulted about a BSD, its objectives, agenda, and expected outcomes; often, they want decision rights.

At one client, board members had become increasingly frustrated with 'presentation-heavy' BSDs. They sought more time to contribute to discussions on external shifts and strategic priorities. We responded by co-designing a fresh agenda, ultimately dedicating more than half the session time to interactive group dialogue.

Group dynamics and facilitation

Boards function best when BSDs create a co-creative and collaborative space, which recognises the limits of directors' role without being circumscribed by overly rigid distinctions between management and board responsibilities. In our experience, small-group exercises that bring directors and executives together to prioritise strategic initiatives are among the most impactful BSD activities. These sessions provide directors with greater insight into operational realities, while giving executives a clearer understanding of board perspectives.

While some directors may initially express reluctance toward small-group work, these activities are often highly valued when they are purposeful and well facilitated. They can create opportunities for more focused, candid dialogue and lead to stronger collective insights.

BSDs are demanding for participants, often requiring sustained attention, complex decision-making, and collaborative engagement over several sessions. To make the most of directors' time and energy, it's essential to design sessions that are not only effective in meeting strategic objectives but also stimulating and engaging—enabling participants to give their best throughout the day.

Effective facilitation goes beyond structuring activities; it also requires attentiveness to how individuals engage within the group. For example, not all directors will feel comfortable contributing in the same way, and some may participate less vocally even when they hold valuable perspectives.

Moreover, facilitators should be cautious not to mistake silence for consensus. Creating deliberate space, and having a structured plan for drawing out less vocal directors, can enrich the quality of discussions and reduce the risk of groupthink.

When carefully designed and skilfully facilitated, BSDs can move beyond routine check-ins to become catalytic moments for strategic clarity and alignment. By focusing on context, design, and dynamics, organisations can unlock the full potential of BSDs—enabling boards and executives to think more boldly and act more cohesively in service of long-term success.

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For well over 20 years, our team of strategy experts have designed and delivered engaging, insightful and results-focused workshops, helping our clients get dramatically improved outcomes from their strategy and planning efforts.