



CASE STUDY

LOST IN THE DARK

A Case Study in Setting Direction without Context

The Strategic Dilemma:

New leadership and a stalled strategic planning process presented a challenge and an opportunity. A challenge for those that did not want to see the process dragged out any longer – important departmental planning was dependent on its completion. An opportunity for the new leadership to significantly influence the strategic direction before it was set!

A gap in the current strategic thinking was its lack of an external, market context for the plan priorities. How could the organization confidently set a new direction without an understanding of it related to market they were striving to serve?

The Engagement and Our Approach:

Focused Momentum® was engaged to work with the new CEO, new COO, new Board President, and legacy stakeholders leading the strategic planning process to redesign the process within the current timetable. The goal was to identify the areas where greater context was needed and conduct a strategy development session that allowed ALL stakeholder (new and legacy) to understand and digest the market realities and trends that could impact future success. The complexity of this challenge was that the client operated in at least three distinct markets.

Using the Strategic Focus Market Mapping process, the Focused Momentum team led three teams to define and research each market. This analysis included creating a way of viewing the market (the map) and where competitors or partners played in it. Each market mapping presentation included an evaluation of where the client operated today and its relative positioning to others.

During the two-day Strategy Creation Session, each market map was reviewed, and strategic priorities were set for each market segment. This context clarified the challenges the organization faced against real external factors and provided new insight into what needed to be done to perform at the desired level in each market area.

Results:

Our engagement led to a significant shift in strategic thinking for the new strategic plan. A new entity was added to compete better against larger peers and to enhance the organization's ability to deliver on the mission.

Early indications are that the new direction has resonance as significant initial funding was secured to investments in building the new entity.

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