

COLLABORATIVE STRATEGIC PLANNING 101

The People and Process Needed to
Engage Your Organization in Actionable Strategy

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COLLABORATIVE STRATEGIC PLANNING 101

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What is Brainzooming™

THE BRAINZOOMING GROUP

Since launching in 2009, Brainzooming has been consulting to clients across industries. We design and implement engaging, productive, and fun strategy processes; they lead to successful collaborative plans and results.

Clients most frequently ask Brainzooming to develop strategies for their important opportunities in:

- Organizational transformation
- Innovation
- Branding
- Leadership

We offer Brainzooming services and content through:

- Custom engagements in-person, online, and hybrid
- Blast! online collaborations delivering ideas and impact in thirty minutes
- Speaking and training programs, both in-person and online
- Digital books, magazines, courses, articles, and tools that translate the Brainzooming method into DIY resources

The Brainzooming Approach to Collaboration

The Brainzooming method and tools emerged from inside a Fortune 500 organization. The result? Our approach makes us the collaborative, results-focused type of partner that you want as a client.

From our first conversation with you, Brainzooming translates your objectives and aspirations into a collaborative process. We are tenacious in delivering your most important outcomes. Through inviting and supporting diverse participants, we'll empower them to positively shape your strategy, implementation, and results.

If you have been searching for a partner who prizes collaboration, diversity, flexibility, learning, results, and fun as much as you do, your search is over. You are ready for Brainzooming!

brainzooming.com

WHAT COLLABORATIVE STRATEGIC PLANNING IS AND ISN'T

At The Brainzooming Group, we're huge proponents of collaborative strategic planning activities.

Collaborative strategy implies a process that goes beyond the board room to meaningfully involve individuals throughout the organization in providing insights and input that shape strategy.

Admittedly, collaborative strategic planning activities are not all that common. In fact, they may be relatively rare.

That rarity contributes to various misperceptions about what it means to open the door wide so that employees throughout an organization can effectively share strategic ideas.

Clearing up five common misperceptions about collaborative strategic planning activities.

COLLABORATIVE STRATEGIC PLANNING IS NOT

Unplanned

Instead of just inviting people and seeing what happens, we **carefully identify potential participants** in collaborative strategy workshops. This ensures diverse perspectives and a process that allows them to participate successfully.

A democracy

A large group makes collaborative strategy planning work. We ask participants to provide ideas, input, and even express preferences and recommendations. While their input is vital, it isn't the final say. The **business leader still owns the decision making** for what makes it into the final plan.

A free for all

We design collaborative strategy activities with a clear understanding of the organization's overall goal. While individual steps may seem to go in varied and unexpected directions, they are all pointing toward **the end result: a highly actionable strategic plan.**

The same for every participant

Individual participants take on different roles within collaborative strategy activities. They may **work on different strategic thinking exercises and questions based on their perspectives and areas of expertise.** The cumulative input provides a richer, more robust basis from which to align and coordinate the organization's strategies, even though everyone didn't participate in exactly the same ways.

More time consuming

Including more participants allows for **greater efficiency and concurrent input.** Additionally, our design process takes into account what makes participants most efficient and effective. These two approaches ensure our client engagements are months shorter than typical strategic planning processes.

Creating Diverse Participation

Embracing the right mix of perspectives and voices

Increasing the number and variety of people participating in collaborative strategy does not mean sending an email to everyone and seeing who shows up to collaborate. The number and mix of participants is integral to designing and facilitating a collaboration process that delivers greater engagement, stronger strategy, and better results.

PERSPECTIVES

Designing a collaborative strategy process, we include three perspectives vital to great strategic thinking, planning, and implementation.

People with Frontline Business Experience

This includes operations, sales, customer service, and other areas with P&L responsibility or customer contact. They provide a solid view of what's going on in the business, what the issues and opportunities are with customers and competitors, and what important strategy areas require attention.

People with Functional

Expertise Leaders in support areas of the business should bring insights into strengths, weaknesses, and key opportunities for important business processes including marketing, human resources, information technology, accounting, finance, etc.

People with a Creative /

Innovative Orientation These people, regardless of foreknowledge of a strategy effort's focus or experience inside a company, are adept at looking at business, industry, and organizational situations in unconventional ways.

VOICES

Across these perspectives, we also look to include three different voices from within the organization. These three voices differ in their backgrounds and what they bring to strategic thinking and strategy conversations.

Familiar Voices Individuals recognized for their long-term engagement, their deep and broad networks, and a strong understanding of relevant and significant opportunities and issues.

Challenger Voices Those noted for questioning the status quo in constructive ways. They are oriented toward finding answers to lingering issues and are sensitized toward not simply ratifying the popular view and calling it good.

Emerging Voices These are individuals with new visibility in an organization or among its audiences. They have been outside the mainstream conversations and represent a valuable perspective the majority might routinely overlook.



PLANNING FOR PEOPLE

For the strongest strategic plan, you need to find ways to include people with each of these perspectives.

One challenge: it is often difficult for diverse individuals to work together successfully and productively. A collaboration process customized to your organization allows diverse individuals to actively and quickly build on the ideas of others and create strong, implementable plans.

Next time you convene a group to consider your organization's future, take a good look. Do you have individuals representing all three perspectives and voices?

Characteristics of Collaborative Strategy Leaders

What skills are necessary to successfully champion a collaborative strategy?

The question is critical because collaborative strategic planning activities require a leadership style that many organizations have never fostered. After completing a collaborative plan, the right type of leader is vital for successful implementation. You can't implement a collaborative strategy plan in a silo. Since so many people have a stake in developing a collaborative plan, those individuals need to participate in the implementation or at least have visibility to the plan coming to life.

Consider these four vital characteristics of those leading collaborative strategy.

1 They actively seek the organization's energy



These leaders continually reach out in all directions for what people in the organization are passionate about and trying to implement. They affiliate up, down, and across the organization; they ask questions, listen, synthesize what they learn, and share updates back to all areas participating in implementation.

2 They integrate the organization's energy and activities into strategy



You can't simply send out a plan and think everyone will implement it. As a collaborative leader sees activity even remotely linked to the bigger organizational plan, they work to integrate it. They find points of connection, suggest adjustments that align activities to the plan to accelerate their momentum, and/or invite cooperation among parties driving activities that SHOULD BE in the plan.

3 They connect people, parts, and pieces that will benefit each other



This seems like the previous step, but there's a difference: this focuses on linking related people and activities to one another. Creating connections helps the organization move forward more quickly, with greater alignment and impact.

4 They serve people, initiatives, and the organization above their own concerns



You could list this first or last; it's the style's foundation. Collaborative leaders are motivated and act based on the overall good instead of what suits their own agenda or part of the company. They are in a leadership role for the organization's overall success, even if it means their own interests have to take one for the team.

Where are your collaborative leaders?

Look around your organization. Which current and emerging leaders are ready to step into new roles championing collaborative strategy?

Making Group Collaboration Productive

Maximize interaction, information, and ideas through varied formats

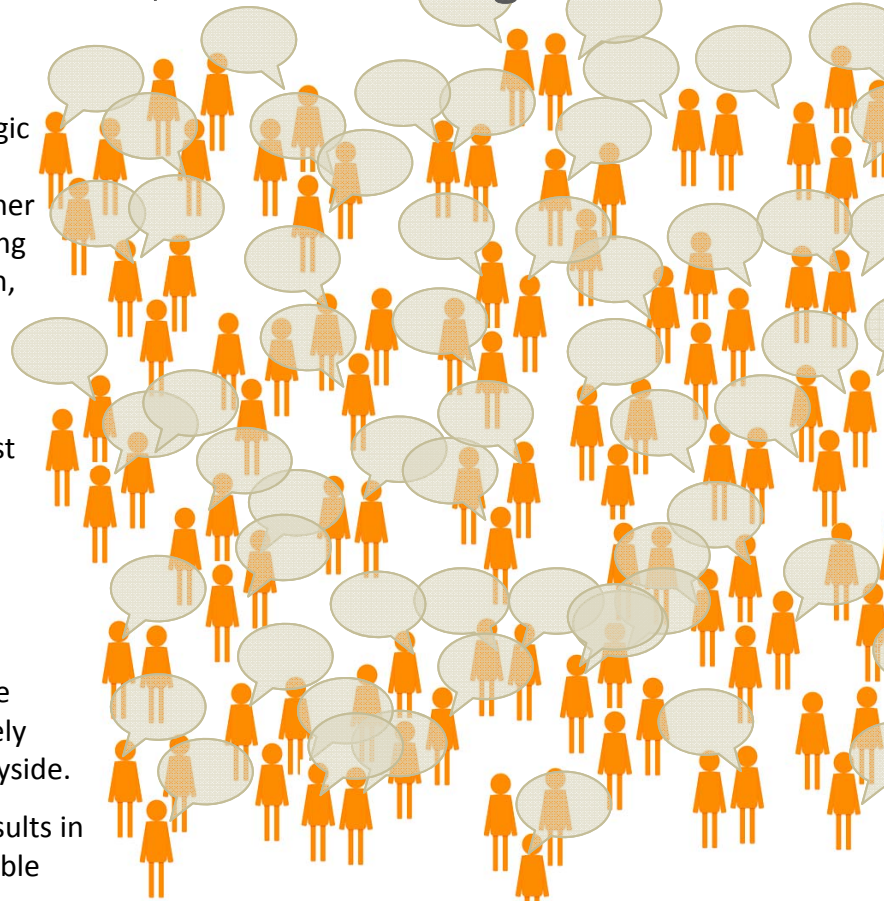
Suppose you are responsible for strategic planning. Your team is organizing a big meeting to bring the key leaders together to work on next year's strategies. Among everything you are trying to accomplish, most vital is maximizing group collaboration and engagement.

In planning the meeting, what types of information sharing will create the most productive collaboration?

An oft-used approach is having one individual at a time share his or her perspectives with the group. To accommodate all the participants, the meeting grows in length. And while one person speaks, everyone else is passively listening. Collaboration goes by the wayside.

Embracing a collaborative approach results in more productive, efficient, and actionable strategies.

In person, this means using small groups and arming them with dynamic structures and strategic thinking exercises. By answering productive questions, everyone can successfully contribute knowledge, perspectives, and ideas. Virtually, it means using a variety of online environments to increase participation, interaction, and capturing perspectives.



Either way, it's vital to have a tested design and implementation approach to select the best strategic thinking exercises, efficiently capture input, and distill the work into strategic themes.

With all these factors in place, a collaborative strategy works tremendously efficiently and effectively.

Use many small groups when

All participants bring **important perspectives**

Close collaboration will **yield new information, ideas, and views**

Concurrent activity will lead to **greater sharing in less time**

There is a need to understand the **participants' many messages**

You have a strategy for stimulating **interaction, capturing ideas, and identifying themes**

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MAKING STRATEGY PLANNING
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putting
COLLABORATIVE STRATEGIC PLANNING
into practice

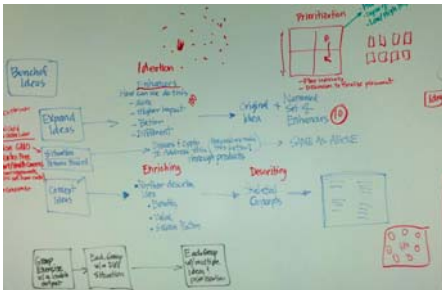
Developing collaborative strategy starts with assessing the organization and environment. You then customize the process and engage the organization with the end result in mind.

The following case studies demonstrates how we apply collaborative strategy for multiple business objectives.

New Product Development Collaboration

Situation

An industrial manufacturer needed to immediately refresh its nearly-empty product innovation pipeline. The company suspected its technical sales team held unshared insights into new opportunities. It hoped to leverage the team's knowledge and experience for new product ideas. Given the importance of keeping salespeople in the field, our client wanted to involve them in front-end innovation without incremental travel or time away from customers.



Experience

To exploit the sales team's collective input within the travel constraint, The Brainzooming Group designed and facilitated a multi-phase innovation jumpstart employing online inputs (including a survey and several collaboration workshops) and one in-person innovation workshop to refill the new product innovation pipeline.

The online collaboration workshops yielded a deeper view of market opportunities. Outside-in innovation exercises examined innovation possibilities from multiple customer and market perspectives, including customer problems, competitive gaps, and alternative benefit options. Fifteen initial concepts emerged.

The group further developed the concepts in a half-day, in-person workshop tucked into a pre-existing, in-person sales conference. We deployed sales, marketing, and operations participants in three cross-functional groups. They rotated through multiple innovation exercises to enhance existing concepts and identify additional ones.

Impact

We ultimately identified 38 new product innovation concepts. Each concept detailed enhancements relative to new products and markets, process improvements, and marketability. Concept reviews detailed advantages, benefits, and critical success factors for the company, its customers, and end users. The client moved several concepts forward immediately into development phase to replenish the innovation pipeline.

Collaboratively Revamping a Service Model

Situation

Literacy KC, a nonprofit focused on improving adult literacy skills, was innovating its teaching model, moving from one-on-one tutoring to class-based teaching at multiple satellite locations. Its objective was expanding its reach and the experience consistency for adult learners. With an already established deadline for the service delivery model change, its executive director wanted to dramatically broaden planning participation to identify new ideas and address issues previously missed without derailing completed planning.



Experience

The Brainzooming Group designed a learner-experience based innovation workshop focused on service model delivery opportunities and challenges. A diverse group participated, including staff, board members, tutors, donors, and students. We used various activities to engage participants with varying levels of experience.

To complement previously completed planning, we:

- Looked at success factors for curriculum and logistics implementation
- Generated ideas for the learning experience design
- Developed an external and internal marketing strategy
- Devised a metrics dashboard and implementation toolkit

Impact

The diverse group was instrumental in fleshing out ideas to improve the service delivery model change's success. The range of participant perspectives included in the workshop played a critical role in seeing the proposed learner experience impacts from all relevant perspectives.

As one participant told the group at the workshop's conclusion, she came to the session intimidated and wondering how she'd be able to contribute. After experiencing our collaborative approach, however, she realized she had a lot to contribute throughout the day!

Collaborating on Manufacturing Process Change

Situation

An industrial equipment manufacturer spent four years discussing a significant change in a critical manufacturing process in a 100-year-old foundry. These internal discussions explored potential concepts, but didn't lead to action. A new corporate innovation initiative identified the process change as a kick-off innovation project. The challenge? Harnessing previous ad hoc thinking, involving a broader group of employees, and quickly moving from talk to innovation. Plant management, in line with its operational philosophy, preferred to use only in-person meetings and workshops to develop the innovation plan.



Experience

Working with the newly-formed innovation team, The Brainzooming Group recommended three deliverables to move the innovation initiative from talk to launch:

- A clear strategic innovation direction defining the initiative's vision, priorities, and success factors
- Articulating objectives and decision trade-offs to shape priorities and tactic selection
- A detailed working implementation plan detailing near-term strategies and tactics, plus a long-term implementation direction

Given the need for exclusively in-person collaboration, we created a series of two-hour planning workshops on the five innovation focus areas. Workshop involved the innovation team plus a rotating group of employees integral to each focus area.

After demonstrating the effectiveness of the Brainzooming approach, plant management agreed to online collaboration for prioritizing the 600 implementation tactics identified in-person. We accomplished the task in fewer than three hours.

Impact

With speed as a priority in developing the implementation plan, we held the two sets of in-person workshops within four weeks from project launch. Within eight weeks, the innovation team prioritized the full plan. The plant manager reported, "We've made changes in the past, but we've never had a plan like this that spelled out every step we needed to pursue!"



WHAT DO PARTICIPANTS SAY ABOUT

COLLABORATIVE STRATEGIC PLANNING?

It's often challenging to describe collaborative strategy to executives who have never participated directly in it.

To most, the concept of gathering more than a couple of people together to collaborate and actually have an incredibly productive experience is foreign. Given the way many business teams and most business meetings function, inviting more people to share ideas frankly sounds like a recipe for disaster.

We get that.

So, to provide a sense of the various impacts that collaborative strategy has on participants, here are reactions from attendees at one of the largest Brainzooming collaboration activities.

What do participants find intriguing and engaging about collaborating on strategic ideas?

Diverse People Collaborating Effectively

“The **vast knowledge being brought together** was beyond expectations.”

“I was thinking I may not be as **included** since I’m not from or otherwise generally associated with (the community).”

“Working with people from **diverse backgrounds**.”

“**Collaboration was so easy** with the group that I was with.”



An Engaging Process

“One of **best group brainstorming sessions** in a long time.”

“Loved the **Boom / Bust exercise**.”

“**Good subject materials** and posters.”

“The shorter time frame worked well.”

“Exercises presented to **gain focus** on a certain area.”

“The **process and the questions**. Have participated in many of these exercises and this was **different in a positive way**.”

“Required a lot of **critical thinking**.”

Networking

“**Met new professionals** who reside here (I’d never met before.”

“Great to see so many people get together to work on this. They **started out as strangers and became friends**.”

“Development of **new relationships and possible partnerships**.”

Unexpectedly Enjoyable

“This was a lot of **fun!**”

“**Very enjoyable** and fun. **Not just a lecture**.”

“Didn’t know what to expect. **Great collaboration**.”

“I **didn’t expect toys**.”

Discovering Shared Thinking

“**Concepts that were more universal** to the table than thought.”

“I realized things that would work for my organization as well as the community as a whole. **I will try to implement these ideas** within my organization.”

“So many of the **ideas shared can benefit any organization in our community**. The question about what we wish people knew about our community really identified our values and strengths as a community.”

Fresh Ideas and Learning

“The **different ideas** we shared.”

“I **thought about something I’d never thought of before** that could benefit from high speed.”

“New and **thought provoking ideas**.”

“**Learned** a lot”

When was the last time one of your organization’s strategic planning meetings or processes generated these types of comments?

IS COLLABORATIVE STRATEGIC PLANNING RIGHT FOR YOUR ORGANIZATION?

Consider the challenges you may have had implementing successful plans, gaining strategic alignment, and meaningfully engaging employees.

Is your organization experiencing planning and performance gaps?

Are strategy AND action important to your success?

Does your leadership team see the potential impact of innovative change?

Is there support for the idea of internal and external collaboration?

If you answer “Yes” to most or all of those questions and haven’t found the right answer to address your challenges, it is time to explore collaborative strategic planning.

Want to talk in greater detail about how your organization will benefit from increased collaboration?

Contact The Brainzooming Group at info@brainzooming.com or 816-509-5320 to explore the possibilities.

**One guy sitting in the corner office
is *not* going to come up with the
best strategy for what's ahead *now*.**



The old days are over.

If you are looking for ideas on how to engage your organization to collaborate and shape strategy, schedule a FREE, 30-minute chat with a member of the Brainzooming team. You'll walk away with innovative ideas on what the right fun and productive strategy formula looks like for you.



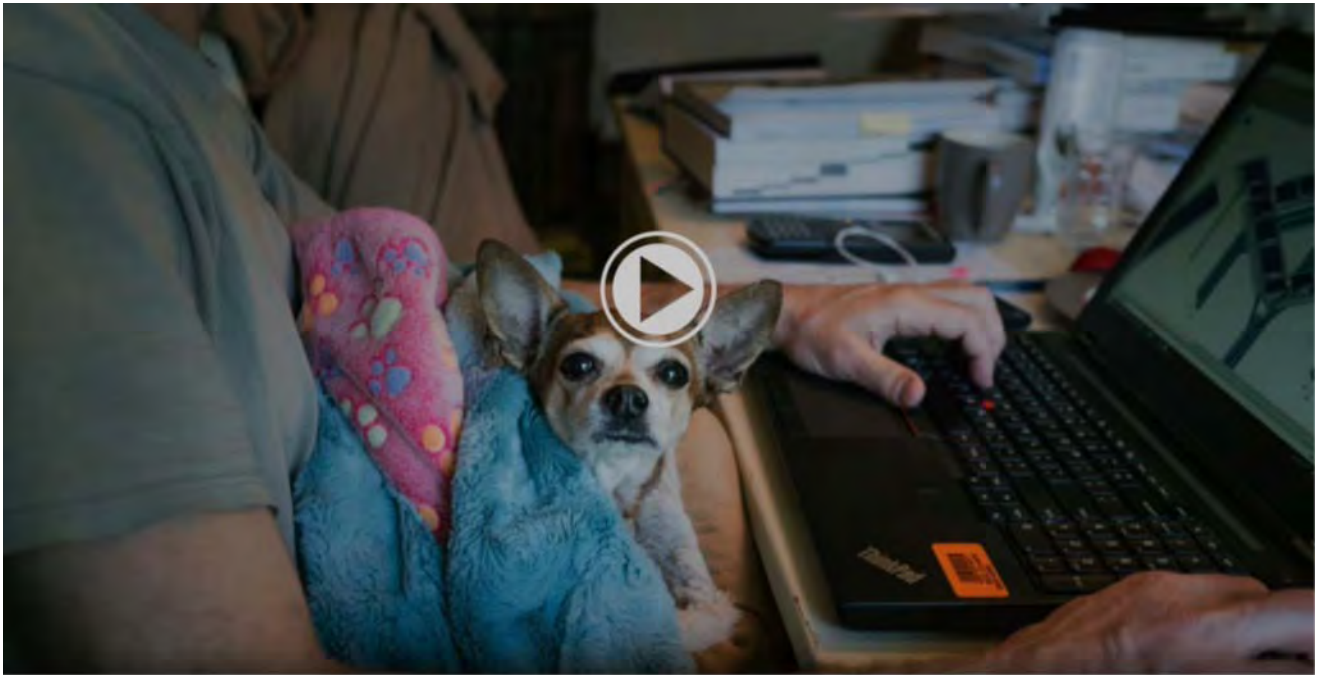
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