



THE PAIN

Lack of 'buy-in'. Is your staff comprised of smart people who want to do the right thing, only the "right thing" changes from week-to-week? Does your organization bite off more than it can chew only to be frustrated by watered-down results? Have you participated in planning sessions before but found the experience to be so tedious and drawn out that in the end you weren't sure what to do differently tomorrow?

THE PROMISE

A **solid plan**, supported by the individuals who created it, can **minimize stress levels and maximize profits**.

PURPOSE

- Assess the organization's current market position
- Identify and prioritize the 'vital few' initiatives
- Generate a dynamic strategic playbook
- Clarify individual goals, roles and responsibilities

DESCRIPTION

Focus[™] is a comprehensive process that follows a go global, go local progression. We begin by pinpointing the opportunities and challenges that exist within the current business environment. We look at relevant internal data and marketplace realities to make informed decisions regarding long-term objectives and short-term tactics. Our collective decision-making process generates the buy-in that is essential to the success of any plan. The process is marked by consultation from all areas of the organization – including the frontline, throughout the process. The plan in its final form is not a surprise to the employees of the firm because they helped to build it. A blueprint for building this strategic playbook is outlined on the subsequent page.

WHAT MAKES FOCUS[™] DIFFERENT

Normally, a few senior leaders spend a few days behind closed doors drafting the annual strategic plan. When it is shared, the senior leaders then try to explain it and hope that others are excited by it and want to implement it. Often this is a hit and miss approach. **What makes *Focus*[™] different is that it begins by gaining feedback from staff, clients and board members so that the senior team continues the process informed by the knowledge contained within the organization.** Leaders are coached to **focus on the vital few initiatives** that hold the most leverage for the organization.

"Strategic direction entails performing different activities than your competitors. Operating effectiveness means performing similar activities better than your competitors perform them... Trade-offs are essential to strategy. By clearly choosing to compete in one-way and not another, senior management makes organizational priorities clear."

Michael Porter, *What is Strategy*

DILLONMARCUS
EXECUTIVE RETREATS

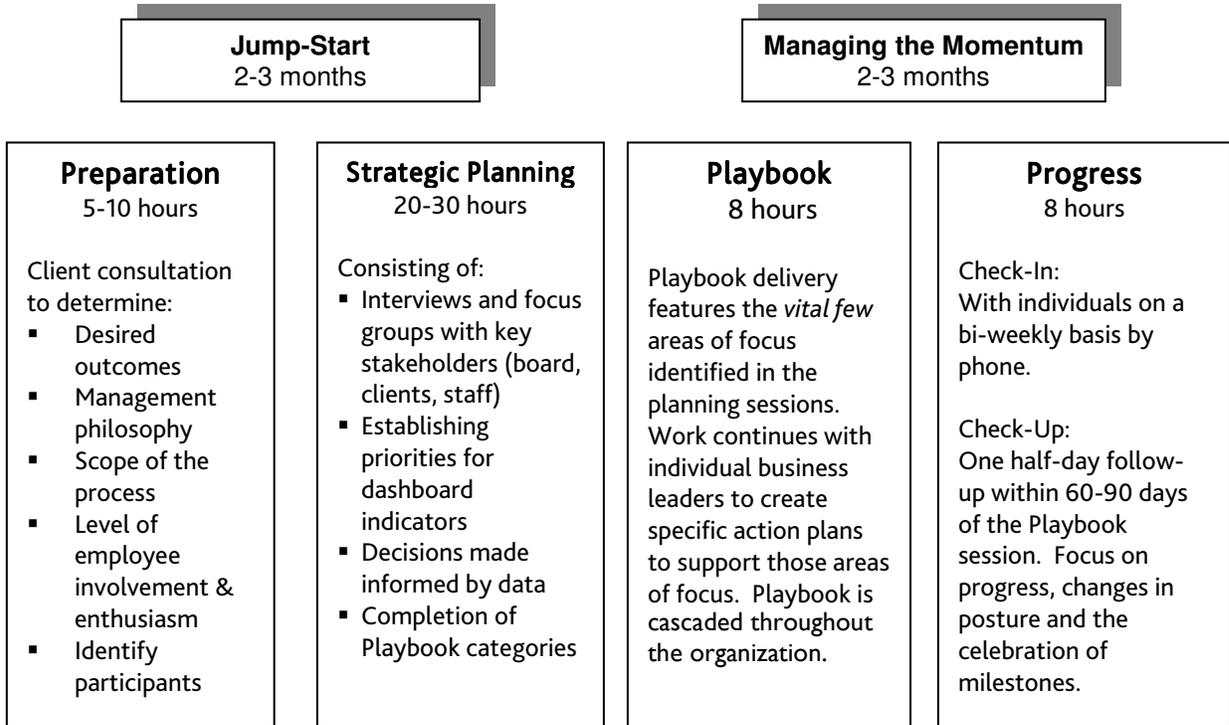
856.667.4641 • www.DillonMarcus.com

© DillonMarcus. All Rights Reserved.



THE PROCESS

The four – six month process, geared towards action, is depicted below:



WHAT'S INCLUDED

The client consultation preparation piece includes interviews with senior leaders and designated advisors. These critical conversations help us build the blueprint for the Strategic Planning session -- a time when attendees roll up their sleeves and get to work. The Strategic Playbook is built during the Strategic Planning sessions. During this phase, we recommend holding interviews with key stakeholders representing a variety of constituencies – the board, clients and staff. Once priorities have been identified, *Managing the Momentum* activities commence for a period of three months to make any needed adjustments and ensure that the plan has taken “root”. Recommendations for cascading the final Playbook throughout the larger organization are also provided.

THE VALUE

The four-stage process results in a clear focus for your firm, ensuring that your human capital and customer resources are being utilized in an intelligent manner. The resulting Strategic Playbook can also be used to benchmark individual and organizational performance. **Your employees will buy-in to the plan because they helped build it!**

People support a world they help to create.

DILLONMARCUS
EXECUTIVE RETREATS

856.667.4641 • www.DillonMarcus.com

© DillonMarcus. All Rights Reserved.