

THE UNIQUE LCA STRATEGIC PLANNING SYSTEM

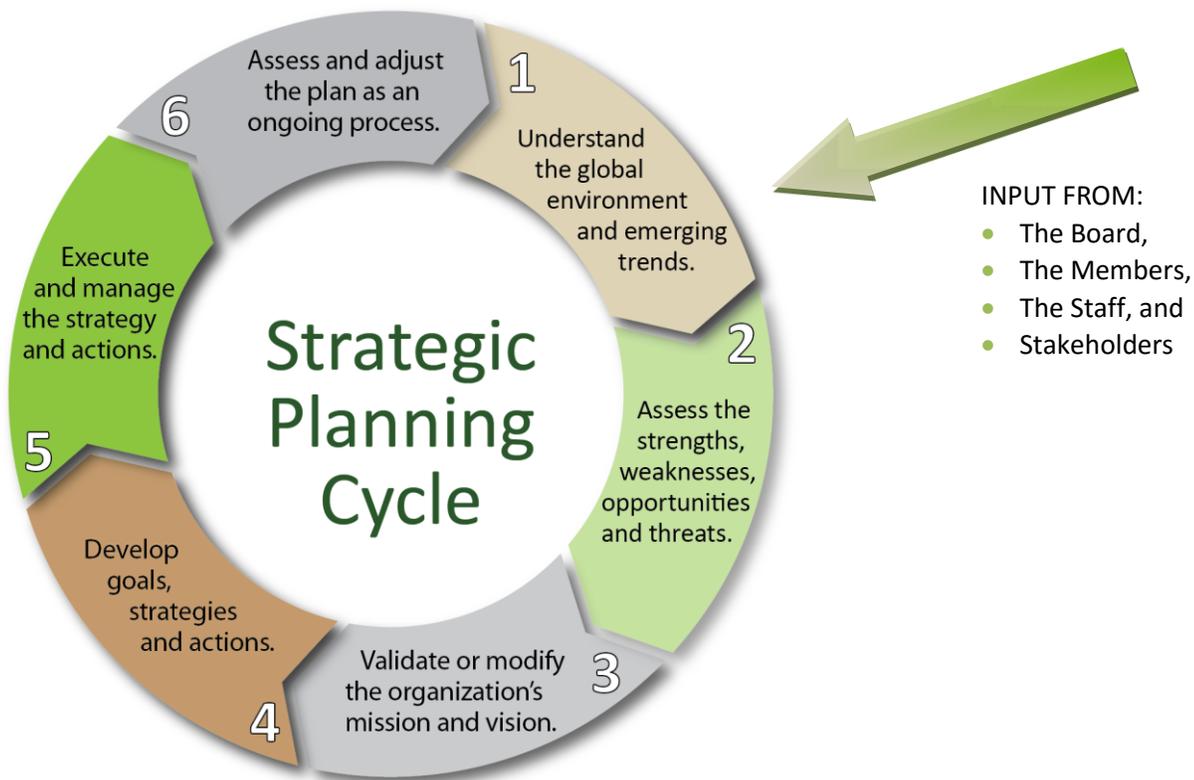
THE LCA APPROACH – LINKING COLLABORATIVE ACTIONS

Long and drawn out strategic planning processes are unacceptable! Today’s environment demands speed, rapid decision-making, adaptive structures and nimble behaviors in order to seize opportunities and mitigate threats. Budgets, staffing and overall resources are dwindling. Time is limited. Doing more with less is imperative. A modern and viable strategic planning system must be responsive to these conditions and reflect rapid formulation and execution. The net time commitment by decision-makers for plan formulation involves participation in a 30-minute phone interview and a one and one-half day or two-day intensive planning session.

The LCA approach is based on a six-step process in the strategic planning cycle. While the strategic planning process is customized for each client, the approach covers the six steps. The compressed process results in a three- to five-year road map and 12-18 month priorities that are executed and managed by the organization’s leadership. The LCA strategic planning process is designed to **link collaborative actions** of leadership, customers, employees and key stakeholders to create a compelling and achievable strategy and plan.

LCA works closely with the leadership and key staff to ensure an overall productive, on target and executable outcome for the organization. LCA’s strategic planning approach is designed to add value to the client experience and exceed expectations of results.

The LCA process is based on **cycle of six strategic activities** which serve as building blocks for plan development.



LCA'S VALUE-ADDED SERVICES

1 YOU ENGAGE. WE PRODUCE.

Plain and simple, in our compressed process, you and your leadership team explore possibilities, share insights, debate alternatives and make decisions about the future. With your content, we do the *heavy lifting* and overnight, produce a draft plan for you to vet and finalize through a consensus-based decision process the next day. We combine your market knowledge and program content with our 30+ years of writing strategic plans and leave you with a final and approved 3-year strategy and action plan for the first 12 months. The best part is that we do all of this in only two days!



2 A LEADERSHIP DECISION TOOL

Lynne Carbone, the firm's President, believes that strategic planning is a powerful leadership and management tool to guide decisions and focus actions for the organization. She demonstrates that developing a plan does not have to be a long, involved or painful process. In fact, with the **right** advance work including a collection of customer, partner, employee and stakeholder inputs and the key decision-makers, it can be an efficient, energizing and rewarding experience. The organization receives relevant strategies and road map for decision-making and a focused action plan for execution in the near-term.

3 TEAMBUILDING TOOLS

The firm's strategic planning system is based on a collaborative model which promotes and facilitates consensus-based decisions. Groups receive the added benefit of teambuilding in the process of planning together. They are coached and given tools to brainstorm, listen effectively, articulate positions, provide constructive feedback, define and problem-solve issues, build strategies, and confront difficult situations and topics. LCA uses multiple interpersonal relationship building tools and methods to promote robust dialog and reality-based decision-making throughout the process.

4 CONSULTANT VS. FACILITATOR

Strategic plan development is complex with multiple and intersecting factors, which need to be translated into a vision, mission, strategies, tactics and priorities. The process support for building an organization's strategic plan requires far more than meeting facilitation. A facilitator's role includes the management of the agenda, time and member participation. The LCA Consultant team utilizes facilitation as one tool among many to achieve the planning process outputs.

The LCA team of professional organization and management consultants:

- Challenge the group’s thinking.
- Offer best practices.
- Make connections that the client or participants may not see.
- Synthesize, analyze, and sort “real-time.”
- Observe, facilitate and if necessary, address group dynamics.
- Coach on leadership techniques and interpersonal effectiveness.
- Provide candid observations, feedback and recommendations to leadership offline.
- Recommend content solutions and not just process suggestions.
- Produce draft plans for client consideration and further development.

CUSTOMIZED & INCLUSIVE PROCESS

5 The firm customizes the planning processes to include the maximum number of stakeholders and produce results-based strategic and short-term plans. Clients are coached to create compelling visions, focus strategies and articulate measurable objectives and tactics for achieving them.

In order to optimize meeting time, LCA tailors pre-planning input activities to best meet the client’s needs and budget. In collaboration with the client, preferred methods for gathering customer, employee and stakeholder inputs are selected. Input questions are tailored to elicit feedback about the future and for populating a SWOT analysis (strengths, weaknesses, opportunities and threats) for the organization. LCA collects and analyzes the inputs and presents a synthesis and analysis to the client prior to the planning meeting. The inputs serve as the basis and starting point for the strategy formulation.

STIMULATING LEARNING EXPERIENCE

6 Individuals process information differently. Various methods of visual, auditory and kinesthetic interaction are applied to stimulate creative and out-of-the-box thinking throughout the planning process. While strategic planning is intense, it does not have to be painful. In fact, it can be a stimulating learning experience and even fun. Typical meeting process aids include:

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| • Automated response system | • Videos |
| • Flipcharts | • Non-verbal communication tools |
| • Surveys | • Consensus indicator tools |
| • PowerPoint presentations | • “Strategic Star” competition and awards |
| • Break-out groups | |

TANGIBLE OUTPUT ALL ALONG THE WAY

7 LCA believes that an idea does not come to life until it is visible in some form of documentation. Thus, essential underpinnings of LCA strategic planning services are the customized designs, materials and “real-time” documentation and analysis necessary to deliver the client’s desired results. The LCA standard for consultation and meeting facilitation include:

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| • Customized pre-meeting materials | • Decision support tools materials |
| • Customized agenda | • On-site documentation, synthesis and analysis |
| • Tailored process materials | • Final report |

During the meeting, the LCA team optimizes the participants' outputs and converts discussions and deliberations into proposed strategies, outcomes or agreements. The staff captures and documents the results of the collaboration and distributes hard copies for the participants to consider throughout the meeting. The "real-time" and distributed documentation:

- Captures discussions of exploration and prioritization of possibilities.
- Allows the group to focus and move forward on their decisions in the planning process.
- Synthesizes recurring themes.
- Highlights strategic level decisions to be answered by the strategic plan.
- Facilitates achieving alignment and group agreement at various stages of the planning process.
- Promotes consensus agreements all along the way to populate the strategic plan.



The plan is collectively formulated, discussed, edited and finalized "real-time" with the entire team. Within one week of the decision meeting, LCA provides a final report, which organizes the output into:

- A final plan;
- Follow-up actions;
- Agreed-upon decisions;
- Breakout session summaries;
- Highlights of discussions; and
- Summary of participant evaluations.

If requested, the firm also provides templates, guidelines and consulting support for plan execution and management.

EXECUTION PROCESS

Lynne Carbone & Associates, Inc. is committed to client success in executing their respective plans. The firm has developed and provides a system for ranking and rating all year-one priorities. The system will generate the priorities in ranked order. Upon request, LCA also provides a tracking system and process for plan reviews, updates and adjustments. The system is based on the concept of the strategic plan's "living process" which must be monitored, assessed and adapted to changing conditions or new opportunities.

CONCLUSION

Lynne Carbone & Associates, Inc. appreciates the opportunity to support organizations in shaping their strategic future and defining the path forward for realizing it. In a full partnership, the client provides the organization, mission and technical content while LCA provides the process, expertise and best practices for building a compelling and achievable plan.