WELCOME & INTRODUCTIONS

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Facilitator
Take 60 seconds to introduce yourself to others at your table:

What is your name?

Where do you work?

What’s the name of your favorite pizza place?
TODAY’S OBJECTIVES

• Introduce key terms
• Understand the value of strategy development and implementation
• Review Georgia Tech’s strategy development and implementation methodology
• Understand the importance of executive level engagement for the success of the project
• Learn about the importance of strategic analysis
• Participate in a SWOT Analysis
STRATEGY DEVELOPMENT & IMPLEMENTATION: OVERVIEW
GTSC’s Strategy Development & Implementation Methodology

GTSC approaches to develop, launch, and pursue new strategies using a six step framework.

<table>
<thead>
<tr>
<th>STRATEGIZE/ENGAGE</th>
<th>PLAN &amp; EXECUTE</th>
<th>REVIEW/LEARN/ENHANCE</th>
</tr>
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<tr>
<td><strong>1. Establish a Solid Foundation</strong></td>
<td><strong>2. Conduct a Strategic Analysis</strong></td>
<td><strong>3. Develop the Strategy</strong></td>
</tr>
<tr>
<td>Engage key leaders to understand their vision for the organization and to clarify their role in driving success of a new strategy</td>
<td>Determine data needs</td>
<td>Compile draft strategic plan document</td>
</tr>
<tr>
<td>Define objectives, scope and success factors</td>
<td>Conduct SWOT analysis</td>
<td>Review/refine draft</td>
</tr>
<tr>
<td>Identify project team members and roles</td>
<td>Identify external environmental &amp; industry trends</td>
<td>Define milestones for each major element of the strategy</td>
</tr>
<tr>
<td>Conduct initial analysis of stakeholders – their roles and relevance to the strategy</td>
<td>Conduct competitive analysis (benchmarking)</td>
<td>Determine executive level metrics</td>
</tr>
<tr>
<td>Identify and engage a team to lead and perform the work</td>
<td>Analyze organizational performance</td>
<td>Develop approach to keep stakeholders engaged and apprised of progress</td>
</tr>
<tr>
<td>Summary of planning and implementation elements, definitions, and steps</td>
<td>Gather input from customers and key stakeholders</td>
<td>Mobilize detailed implementation plan – assignments, resources, measures of success</td>
</tr>
<tr>
<td>Discussions with project leadership</td>
<td>Create detailed plans for implementing the strategy</td>
<td>Develop 12 month implementation roadmap</td>
</tr>
<tr>
<td>Project scope questionnaire &amp; checklist</td>
<td>(project planning)</td>
<td>Conduct sponsor de-brief</td>
</tr>
<tr>
<td>Announcement of the planning process</td>
<td>Environmental Scan - SWOT survey, and summary; PEST(LE) other customer inputs (i.e., customer feedback); Benchmark inputs and/or literature review.</td>
<td>Track progress made toward goal achievement</td>
</tr>
<tr>
<td>Kickoff meeting invitation</td>
<td>Focus groups templates (scripts, invitations, confirmation, sample questions)</td>
<td>Celebrate success</td>
</tr>
<tr>
<td>Communications plan</td>
<td>Kickoff deck introducing project</td>
<td>Refine as needed</td>
</tr>
<tr>
<td>Strategic planning advisory team</td>
<td>Mission statement development exercise</td>
<td>Strategic planning quarterly report</td>
</tr>
<tr>
<td>Shared team site request (if needed)</td>
<td>Vision statement development exercise</td>
<td>Prepare for annual refinement (or more frequently as needed)</td>
</tr>
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</table>

**Methods & Tools**

- Invitation to interview leadership stakeholders
- Data collection template
- Hold facilitated session(s) and/or interviews
- Environmental Scan - SWOT survey, and summary; PEST(LE) other customer inputs (i.e., customer feedback);
- Benchmark inputs and/or literature review.
- Focus groups templates (scripts, invitations, confirmation, sample questions)
- Critical questions for sustainability
- Metrics tracking readiness questions
- Implementation planning & gap analysis/roadmap
- Mobilize other methodologies as needed – project management, organizational design and development, process optimization and change management
GTSC’S STRATEGY DEVELOPMENT & IMPLEMENTATION METHODOLOGY

GTSC approaches to develop, launch, and pursue new strategies using a six step framework.

1 Establish a Solid Foundation
   • Engage key leaders to understand their vision for the organization and to clarify their role in driving success of a new strategy
   • Define objectives, scope and success factors
   • Identify project team members and roles
   • Conduct initial analysis of stakeholders – their roles and relevance to the strategy
   • Identify and engage a team to lead and perform the work

2 Conduct a Strategic Analysis
   • Determine data needs
   • Conduct SWOT analysis
   • Identify external environmental & industry trends
   • Conduct competitive analysis (benchmarking)
   • Analyze organizational performance
   • Gather input from customers and key stakeholders

3 Develop the Strategy
   • Define strategy for gathering stakeholder input in the plan development phase
   • Develop clear and compelling statements about mission (purpose and value), vision (future aspirations) & values (guideposts for behavior)
   • Establish goals and objectives
   • Create detailed plans for implementing the strategy (project planning)

4 Validate the Strategy
   • Compile draft strategic plan document
   • Review/Refine draft
   • Define milestones for each major element of the strategy
   • Determine executive level metrics
   • Develop approach to keep stakeholders engaged and apprised of progress

5 Implement the Strategy
   • Mobilize detailed implementation plan – assignments, resources, measures of success
   • Develop 12 month implementation roadmap
   • Conduct sponsor de-brief

6 Track & Celebrate Progress
   • Track progress made toward goal achievement
   • Celebrate success
   • Refine as needed
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   - Refine as needed
A strategic analysis provides a holistic understanding of an organization, its position in the marketplace, challenges it will face from competition, changing dynamics of the industry, and identification of the strategic opportunities to differentiate.

Conducting a strategic analysis will allow you to identify these factors and develop a strategic plan that strategically positions the organization to carve out a unique position and mitigate threats.

A strategic analysis examines both internal and external factors that may impact the organization’s strategic direction.

Conducting this analysis is not a precise science. The outcome is to provide a good understanding of the current landscape to help inform the focus of the strategic plan.

A factor is any issue or trend that may be an opportunity we can capitalize on, or conversely, a threat we may need to prepare for and mitigate.
### SWOT Analysis

#### Strengths
- Competency Areas
- Track Record/Experience
- Relationships/Partnerships/Collaboration
- Tools/Resources for Campus

#### Weaknesses
- Lack of Clarity – Roles and Services
- Marketing/Visibility
- Availability/Accessibility (Capacity)
- Role within Institute/Influence
- Focus on Enterprise-Level Projects

#### Opportunities
- Partnerships/Synergies
- Marketing/Visibility
- Smaller Projects
- Strategy Development Planning

#### Threats
- Capacity
- Lack of Clarity/Understanding of Value
- Lack of Awareness/Visibility
- Potentially Changing Priorities/Support
- Resource Constraints
- External Consultants

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**CREATING THE NEXT®**
Top Trends in Higher Education

Keep abreast of the major trends in higher education and incorporate this information into plan development to provide a holistic perspective of the current and future operating environment. This would examine for example, the projected trajectory of how value is defined and derived, and how emerging student populations will access educational experiences (e.g. expansion of delivery through online and blended formats).

External Environment/Industry Trends

Data collection and analysis related to the sponsor’s “industry,” growth/challenges of the local area, and the economic climate of the region and nation. This would involve looking at the specific dynamics within a specific function or discipline (e.g. what is happening and likely to happen in business education across the country and in the local market).
“PESTLE” is a framework that helps us define and narrow the external factors that may impact our ability to carry out our mission. Each letter stands for a key external area that is applicable to all organizations:

- **POLITICAL**: Political factors that can impact the operating environment.
- **ECONOMIC**: Factors affecting the economic environment in which the organization operates.
- **ECOLOGICAL**: Environmental factors that can impact the operating environment.
- **LEGAL**: Factors related to current regulations and laws that can impact the operating environment.
- **SOCIAL**: Cultural and demographic factors that can impact the organization.
- **TECHNOLOGICAL**: Factors related to advancements in technology and process that can impact operations.
Competitive Analysis (Benchmarking)

Benchmarking of organizations that are considered competitors or those that are similar in nature to the sponsor’s organization, as well as aspirational organizations. In determining the organizations for comparative analysis, consider differentiation such as, “what are our potential students’ other choices and what factors set us apart from them?”

Organizational Performance

Data collection and analysis related to how well the organization has performed. This can provide insight to identify opportunities to advance the organization. A performance data trend analysis can look at historic information against recent performance to determine changes over time.

Other Sources of Relevant Data / Information to Consider

- Past benchmarking studies, surveys, reports
- Academic Program Review
- Peer review studies
- Institute/Organizational data
STRATEGY DEVELOPMENT & IMPLEMENTATION: EXAMPLE SWOT – GTSC
SWOT Surveys sent to 101 individuals:

- Executive Leadership Team
- Executive Management Team
- HR Business Partners /HR Reps
- A&F Leadership
- Academic Leadership
- Research Leadership
- Former GTSC Employees
- Representative Partners
- Student Leaders

### DEMOGRAPHICS

<table>
<thead>
<tr>
<th>Category</th>
<th>GT Faculty &amp; Staff (93)</th>
<th>Partners (2)</th>
<th>Student Leaders (6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response Rate</td>
<td>61%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>No Response</td>
<td>39%</td>
<td>50%</td>
<td>50%</td>
</tr>
</tbody>
</table>
STAKEHOLDER ENGAGEMENT QUESTIONS

What we asked our stakeholders:
- What do you perceive as GTSC’s greatest strengths?
- What do you perceive as GTSC’s greatest weaknesses?
- What do you perceive as GTSC’s greatest opportunities?
- What do you perceive as GTSC’s greatest threats?
- What do you perceive to be the value that GTSC brings to the institute?
- How could GTSC add more value?
- Additional thoughts on GTSC’s strategic direction

Notes:
- If using Qualtrics or other survey instrument if de-associating responses feel free to say so. There are ways in using these survey tools to disassociate, be sure you understand how to do so if you say that you will be doing that.
- Once the data is collected, group the response data into thematic topics. You can do this in some survey systems or via Excel. You may want to track counts to share the impact of one topic over another based on the inputs you’ve gathered.
Take the summarized SWOT information along with the additional strategic analysis components that you’ve collected like trends in higher education, external environment (PESTEL), Benchmarking analysis (if using) and organizational performance. Aligned them with the Institute/Organizational strategic plan.

We engage the entire team in discussions around goal setting based on the above insight. Splitting up into teams oriented towards specific goals that would work on objectives. This takes time be sure to take the time to work through this material – however – don’t let this drag on so that you never get to the implementation stage. Assign owners to each of the goals to ensure the necessary focus is placed on the work needed to take you to the next level.

Good luck!
Goal 1: Build knowledge, skills, and tools for the GT community to advance organizational effectiveness.

Goal 2: Proactively establish and strengthen mutually beneficial partnerships with Institute leaders, faculty, staff, and students.

Goal 3: Strengthen our ability to measure and demonstrate our value.
STRATEGY DEVELOPMENT & IMPLEMENTATION: SWOT ACTIVITY
Speedy Pizzeria opened in 2015. They are located in Atlanta and serve three types of customers:

- Dine-in
- Delivery
- Carry-out

The company has 115 employees and three stores.

Things are going well. However, the pizzeria market is very competitive and rapidly changing. The owner Tony wants to take the time to create a strategic plan and vision for the future of Speedy Pizzeria. Tony’s been pitching expansion to food trucks and robotic automation as part of the future but he values his employees and is asking you as an employee of Speedy Pizzeria to participate in a SWOT analysis to get your feedback and insight.
STRATEGY – SWOT
YOUR TURN

• Break up into groups of ~10
• Each table will be assigned an initial area to focus on S, W, O, T
• Every 7 minutes we will switch to next area so that each group will have contributed to each of the areas of analysis (SWOT).
• Each team will assign a person to scribe everyone’s ideas
• Assign a person to present (the last round is what will be presented to the group).
  • Each group will have 2 minutes to share their analysis to the group.
• Tony, Michelle and Juana are here to help with any questions.

Internal Focus:
S Strengths
W Weaknesses

External Focus:
O Opportunities
T Threats
The competency areas discussed in the other breakout sessions are critical for successfully carrying out strategy development and implementation work:

- Identifying who needs to be involved in the improvement effort and addressing the needs of those who will be impacted by the change as they transition to new ways of working.
- Managing the activities required to carry-out the improvement effort, and providing the structure for implementation.
- Clearly aligning the process to the strategic direction of the organization so they advance the goals and objectives.