STRATPRO

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End-to-End Case Study

Company Description

ContractCo is an electronics contract manufacturing firm located in Colorado. Their focus is on small-run, high-end custom electronics jobs from local customers. They have done work for remote customers but have found that the higher-touch, in-person communication leads to a better result.

Their customers span a wide variety of local electronics product designers and distributors. They also have contracts with Government contractors and medical device companies. Their main positioning is that they are t '1@@he right alternative to offshore contract manufacturing for smaller-run, sophisticated jobs. They do not strive to be the cheapest alternative, but they have been around for a long time, provide generally good quality work and partner with their customers.

One of ContractCo's challenges is a heavy reliance on two flagship customers. The amount of business varies from year-to-year but in some years these customers can account for 70% of their total revenue. Last year, they earned over $3M in gross revenue. They have 25 employees with several part-time employees doing at-home assemblies. They are overly dependent on several key employees who have deep expertise using the high-end machines for the production of printed circuit boards. They tend to get the job done but, there is a concern that they are overly reliant on knowledge within the heads of key employees and not well-documented processes.

ContractCo has approximately $2 million dollars in electronics manufacturing equipment. The equipment is significantly underutilized. They buy leading-edge, but not bleeding-edge equipment, but don't always find the right work to fully utilize new equipment.

By design, they have a very small management team. Most of their staff works on production. The margins are low in this industry and they deal with this by keeping overhead lean. Most of the employees are blue collar staff. Many of them do not have high school degrees and some have criminal records. ContractCo gave these folks a chance to earn a decent income and to learn new skills. They cannot pay employees as much as they'd like but they are on the higher end of the contract manufacturing company pay scale.

They purchase inventory on-demand, since each project is custom. The large repeat customers permit them to purchase inventory in greater quantities. They charge both for labor and parts. They do not own their own building and rent office space.

The full Blueprint report for this case study is located here.

Senior Leadership Team

William Montoya – Founder and CEO. Key Decision Marker (KDM) 100% Owner. (D=89 I=42 S=8 C=71)

> *William founded the company 25 years ago. He is the sole owner of ContractCo. He was working in the industry and didn't like working for others. The employees absolutely love him. He is the "pied piper" of the organization. He is a hands-on owner. He used to do all the sales but hired Therese for this. He still works on estimates, does customer service and even visits customers to do deliveries. He builds employee loyalty by being able to work in the trenches, being transparent and being a lot of fun to work with.*
>
> *He does not want to grow the company quickly. He finds that it is too much of a headache to find good staff. He's happy if they grow by 10% a year. Even if there is no growth, as long as the staff is mostly busy, he is ok with that. His facilitator explained that if he wants to sell the company, he should strive for a track record of year-of-year growth.*

Katrina Fields – General Manager. Second in Command. Receives 40% of Distributions. (D=79 I=8 S=70 C=58)

> *Katrina is the second in command. William brought Katrina in once he got his first client. She's like a founder in tenure and influence yet is not technically a founder or owner. William and Katrina both receive 40% of the discretionary profits each quarter. The rest of the staff receive the other 20%.*
>
> *Katrina can be prickly to work with. She is really good at what she does. She's been working in the business from the start, in every role, so she has a tremendous amount of knowledge. She rubs a lot of staff the wrong way. She can be quite condescending to some of the staff that she considers to be inferior (which are most of them).*
>
> *Katrina would like to retire in the next few years. She's been saying that for years. But she seems to be taking it more seriously now. She isn't working the hours that she used to. She has not done a good job of delegating any of her tasks. She has a lot of knowledge, has an eye towards retirement and has not handed off any of her tasks.*

Rick Moneypenny – Contract Accountant. Works 2.5 days per week. (D=12 I=26 S=89 C=91)

> *Rick has been working on a contract basis for the company for two years now. They are not real happy with his work ethic, productivity or quality of work. They say he is "going through the motions". He is considered part of the Strategic Leadership Team (SLT) because he works with the money. However, he doesn't know the business well and has very little interaction with the rest of the staff.*

Therese Callahan - Business Development. (D=74 I=84 S=7 C=37)

> *Theresa is the newbie. She's been with ContractCo for just over a year. As William and Katrina have gotten older, and with Katrina's desire to retire, they came across Therese and decided to bring someone on who knows the industry and can focus on business development. She's in her 60s too so also has longevity challenges. She has been successful in winning new clients. However, it's caused tension that she wants to grow faster and William wants to grow slowly. They've had some conflict when she wanted to pursue new clients and William did not. She is generally pleasant to interact with and brings some significant new energy to ContractCo.*

Wilfred Kline - Operations Manager. Manages project schedule and day-to-day operations. Responsible for on-time, quality product delivery. (D=53 I=12 S=86 C=61)

> *Wilfred's managers the floor. He is the primary supervisor of the operations staff. He has been with ContractCo for 12 years. ContractCo does not have a well-defined org structure. William does the administrative work for the staff. He does their performance reviews and determines pay raises. Katrina can also come into the operations area and change priorities. This can be frustrating to Wilfred, especially with his high S.*
>
> *Wilfred is a really good technician. He has worked on every machine and role in production. The staff respects him. He is quiet and unassuming. He is not good dealing with confrontation. He tends to look the other way when there is conflict on the floor, rather than addressing it. While the occasional disruptions from Katrina are frustrating to him, he realizes that he is not the best with people and does appreciate that Katrina and William have a strong presence with the staff and can step in to take on things outside his comfort zone.*

Why StratPro?

William is an active a TAB Member. His facilitator noticed ContactCo as a great candidate for StratPro. William wants to sell his business in the next few years. Katrina, his second in command, has talked about retiring. ContractCo is highly dependent on William and Katrina. The opportunity is for the facilitator to help William prepare ContractCo to be less dependent on him and to be attractive to an acquirer.

Because William is a Member, an Alignment Meeting wasn't necessary. During a prior coaching session, William had expressed concern about the company's direction and his uncertainty for how to help the team get on the same page about eventual acquisition. The facilitator suggested that they explore that issue in more depth at their next coaching session. William agreed.

At the next coaching session, the facilitator came prepared to purposefully explore the issue in more depth, determining the importance and urgency to get William's team aligned on the company's future. The facilitator began the session by presenting StratPro using the "One Page Wheel and Workshop Summary Handout" in a Private Coaching Session. He described the process and talked about the workshops. William was initially reluctant. He said that if he is going to sell the business, why should he work on things like the long-term vision of the organization?

The facilitator explained that businesses that are too dependent on the owner are not attractive to acquirers. ContractCo does not have a strong vision of the future and is not run very strategically. An acquirer will typically want to purchase a company that can perform at a high level once the owner has departed. This resonated with William and so he agreed to schedule an Introductory Workshop ("Workshop Zero") with his team.

William is a highly transparent owner with his leadership team and the employees at large. Everyone is aware that Katrina wants to retire. She speaks about it a lot. William has also mentioned the possibility of selling. He always makes a point to say that he will make sure his staff will continue to have jobs in the event of a sale. His employee turnover rate is low for his industry. The staff trusts William.

The facilitator decided to discuss the StratPro price with William directly before the introductory workshop, rather than in the room with his team. She felt like their relationship was very strong. William was currently paying $695 per month. The facilitator reviewed StratPro membership – the length and purpose of each session, number of sessions, her role in each session and preparation between sessions. She also defined the month-to-month approach, as well as the terms of payment.

At the close of her description, she asked William whether the description made sense and aligned with his needs to get his team working together effectively and to achieve the desired outcome in the timeline William had described. After William agreed that he understood the commitment and expected outcome, the facilitator stated that when William goes forward with StratPro, and holds one workshop per month, the dues would be increased to $2400 per month. William challenged her on this and questioned whether they should even hold the Introductory Workshop.

The facilitator affirmed that she understood his concern about the investment. She followed by effectively restating the value to William by reminding him of the urgency and importance that he had expressed during their conversation and asking if she understood his situation correctly. She also reinforced the month-to-month nature of the agreement, which is purposefully designed to enable his team to experience the process before investing. William agreed to move forward.

Introductory Meeting ("Workshop Zero")

Exercise	Results
Attendees	The SLT members listed above were all in attendance.
Establish Decision Outcome	William and the facilitator agreed in advance on the outcome. William said that if his team wants to go forward, he will support it. He was reluctant to commit to the full program. The facilitator explained that he can stop it if it is not achieving William's goals. She also explained that if William doesn't make a strong endorsement of StratPro to the team, the team will not take it seriously and it will fail. William therefore agreed that he would communicate he is serious about considering if StratPro is right for the group and he wants them to be honest in helping him decide. If the team wants to go forward, he will affirm his strong support to the program.
Facilitator Introduction	The facilitator is known to the SLT. However, they are fairly confused about her role. She explained how she has worked with William in the past and a bit about her professional background.
Single Biggest Challenge	The SLT identified the following key challenges: ● **Wilfred**: The culture is poor. Too much gossip and pettiness between staff. ● **Therese**: Inconsistent quality of work. For simpler, repetitive jobs, the quality is fine. For custom jobs, the quality is inconsistent. ● **Rick**: The business is way too dependent on two large customers. ● **Katrina**: The staffing is too lean. They are a low margin business so they keep the management staff lean. She knows the business is too dependent on her and William but there is not enough other staff to delegate to. ● **William**: With Katrina thinking about retiring, he is worried about how key roles such as inventory management and scheduling will be handled.
StratPro Wheel Assessment	Each section of the StratPro wheel was discussed. The attendees scored each section, using the StratPro Introductory Workshop Handout, as follows: ● **Align**: The team rated this a 5. They felt like they communicated well and there was no major conflict. However, they realized from the discussion on the single

	biggest challenge that they are not discussing the big issues in the business. ● **Vision**: The team rated this a 2. The team was uncomfortably direct about the lack of vision. This was awkward for William to hear. ● **Diagnose**: The team rated this a 4. They believed they had a good sense for what is working well and what is working poorly. However, they have never formally assessed the business. Moreover, while they have good cooperation with local competitors, they realized they don't have detailed knowledge about how they compare to other businesses in their industry. ● **Plan**: They rated this a 3. William was surprised about this. He and Katrina spend a few days each January creating goals for the year. Their facilitator puts them in the Blueprint. However, the rest of the team wasn't aware of what the key goals or strategies were for the current year. ● **Execute**: They rated this a 7. They are good at getting known things done. They are also resourceful when they run into challenges. However, challenges exist with quality and scheduling. ● **Optimize**: They rated this a 4. They are so focused on execution that they don't take the time to systematically step back from the business, assess what is working and what is not working, and develop improvements. They average rating is 4.16. They didn't feel good about this. But they were appreciative that they went through this exercise and it revealed some key issues and areas they need to perform at a much higher level. William was appreciative that his team was engaged and honest in their feedback.
Tell Their Story	There is a lot of material here that the facilitator can simply reflect back to the group. She made good notes on the flipcharts, so this was easy to summarize. The team identified culture, quality, dependency on two customers, high dependence on owners and not sure how to delegate tasks from the owner and GM. These are big, strategic issues that everyone realized exist, are important and need to be addressed. The facilitator also asked them about their feedback on having about an average score of 4 on the wheel. They felt like this was lower than it should be. They are successful. But they admitted that they are good at execution work and need to improve strategically. The facilitator recapped the wheel assessment, by

	calling attention to areas they are doing well in and those falling short.
The Offer	The facilitator said that she appreciated the discussion here today. It was difficult at times, but the group was clearly committed to the business and worked together respectfully. She felt like they were honest about where they are now and she sensed eagerness to finally solve some of these longstanding challenges. She said she thought they would be a great group to work with and would benefit from StratPro. She summarized the StratPro program, focusing on the workshops (occasionally reinforcing how certain workshops align directly to certain issues that came up during their session), running the business strategically, improving the culture, working better as a team and becoming an organization that is good at accountability and execution.
Next Steps	William is very transparent. He allowed the facilitator to stay as they discussed the feedback. Rick was concerned about the amount of time involved. Wilfred expressed this as well, although noted that it would be a good opportunity for other people in his team to lead when he is in the workshops. They felt like the time away from the business would be hard. William went around the table and asked each member for a thumbs up or down on whether to schedule the next workshop. They realize clearly that they must go forward with StratPro. William mentioned that they discussed doing two workshops per month. Based on the feedback from the team, he agreed to go forward with one workshop a month. He emphasized that this is a big investment and they need to take it seriously. They compared calendars and scheduled the first workshop in 3 weeks.

Pre-Meeting with KDM

In advance of starting the workshops, the facilitator met with William, the KDM, to gain alignment on key aspects of the workshop. They agreed on the following factors.

- **SLT Members**: The KDM selected the four managers listed above as the SLT. He felt like they are generally recognized by the staff as the leaders in the organization. He also felt that all disciplines and functions in the organization will be represented by this team. He wasn't sure on Rick but thought the accountant should be included.
- **Team Dynamics**: He did not believe there was any significant conflict with any SLT members. However, he is concerned that Wilfred will not be very positive in the meetings. He calls these kinds of forums a "waste of time" and gets stressed out when he is not directly supervising the staff.
- **Decision-Making:** The KDM wants decision by consensus from this group. The KDM wants the team to feel like a group of equals and not to always make the decision. If there is an impasse, the KDM will decide. The facilitator said she can facilitate to this end, but it will be up to the KDM to be disciplined, to listen more than speak and to be corrected if he is not allowing consensus.
- **Terminology:** This was a tough discussion because of different meanings for the same thing. They realized a few differences in terminology but that this will resolve as the workshops proceed. Some specific terminology items were decided:
    - ContractCo use OKRs – objectives and key results – popularized by Google. In StratPro terminology, this is a combination of Goals and KPIs. This will be tricky to adapt StratPro terminology to this.
    - The KDM also felt like they would keep calling the Accountability Chart the "Org Chart". The facilitator thought that was ok.
    - ***Note:*** *For the purposes of this case study, we'll use the StratPro terminology. These differences in terminology are examples of what a facilitator will face with clients. We need to do our best to adapt to the organization's terminology so the SLT connects with StratPro as much as possible.*
- **Communication:** The KDM committed to communicating with the full employee base on the StratPro workshops and what they will be doing. The KDM is quite transparent. The KDM is not concerned that any employees will feel left out since they were not on the SLT.
- **Private Topics:** The KDM explained that he would like to exit the company in the next few years. He has discussed a sale with different potential acquirers over the years but it never led to an offer. He would

like to keep the specific offers off the table for the workshops. He would also like the strategic plan to focus on making the company better and not about how to sell it. However, generally discussing an exit is ok.

- **Pre-Work**: The KDM assured the facilitator that the SLT would do their pre-work. The KDM and facilitator agreed that if any pre-work is not done, the work will be done directly in the workshop. This would result in longer workshops and more expense. The KDM agreed to this.
- **Definition of Success**: In the Introductory Workshop, the SLT identified several critical issues. The KDM sees their overall performance as being good but not great. The SLT identified they are too dependent on a few customers and want to achieve a diversified business. Their expensive equipment is underutilized. The business is too dependent on William and Katrina. The KDM also mentioned that their culture leaves a lot to be desired. He said that while each SLT member is good at their role, he does not view them all as strategic managers who are able to take the organization to the next level. These are all things he'd like to resolve through StratPro.

  The facilitator reminded the KDM that these are very big problems and they will not be resolved through a few workshops. She said that by the end of the workshops, they will have a plan and strategies for addressing some, if not all, of these challenges. The plan will be prioritized. The SLT will need the discipline to focus on one or two priorities at a time. It will take several years to address this scope of challenge. She also reminded him that many good plans fail due to poor execution. She said that they will need the discipline to get the plan right to meet their vision, and then place their primary attention on execution. The KDM didn't love hearing this message but he appreciated the honesty.

- **Blueprint Data Entry**: The KDM did not initially want to involve anyone else in the workshops, nor did he want to assign anyone from the team to do the data entry. The facilitator suggested that maybe someone who could be a future member of the team could join in this capacity. He'd have to ensure he had his/her full trust. He thought about this and suggested that Tricia, Katrina's daughter, would fit this role. He'd need to speak to Katrina and Tricia first. He said she may not be able to make it all the time due to workload, but they'll start with this approach. *(Assume for this case study that someone from ContractCo is doing the data entry; if someone is not available, the facilitator will record the entries on the white board and enter them into the Blueprint afterwards.)*

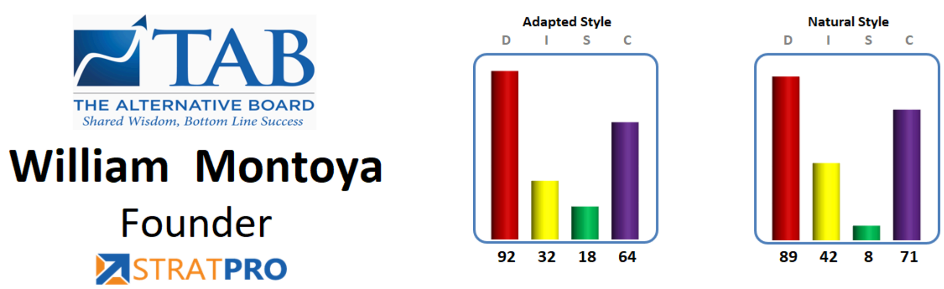
Team Alignment Workshop

Exercise	Results
Pre-Work	SLT Members will read the Team Alignment chapter of the StratPro book. SLT members will complete the DISC assessment as well. The facilitator will bring the following assets into this workshop: ● DISC Overview Presentation ● DISC Tent Cards ● DISC Wheel with SLT members plotted ● DISC Short Reports ● DISC Communications Exercise ● DISC Full Reports
StratPro Expectations and Process Overview	The KDM wanted to lead this section. He did not want to spend a lot of time discussing details of the program. He trusted the facilitator and felt that the team would trust the process. He conveyed first, the key challenges that the SLT identified in the Introductory Workshop: ● The culture is poor. ● Inconsistent quality of work. ● The business is way too dependent on two large customers. ● The staffing is too lean. ● With Katrina thinking about retiring, he is worried about how key roles such as inventory management and scheduling will be handled. He then reminded the team that they scored their performance in the StratPro areas about a 4. He asked "are we a 4 organization? Are we a 4 team? We need to perform at a much higher level.'" He then explained that this is a <u>*transformation*</u> program. They are not looking to get a little better through this process. They do not simply want to address their key challenges. Instead, he wants to up their game so that they, as a team, and the organization at large, are performing at an entirely new level. This is not just about solving current challenges but preparing the organization to address new challenges that they'll face in the future. He does not want them to in any way resent the time they are spending in these workshops. Instead, they need to do the pre-work, they need to be prepared, and they need to show up as their best selves, fully ready to give their best to each workshop.

<table>
<tr><td>Project Name</td><td>The facilitator led a discussion with the group about choosing a project name. The team debated different ideas, including Picasso, Ada, Future Link, Tesla, Ferrari and Manhattan. Katrina championed Ada, after Ada Lovelace. As an electronics manufacturer, she always felt affinity to one of the earliest and foremost female mathematicians, who was also influential in designing a very early computer.

Katrina provided the best advocacy of her suggestion, and the SLT agreed to call their project "Ada".</td></tr>
<tr><td>Decision-Making Approach</td><td>The facilitator described the different decision-making models. The KDM explained that he'd like the group to employ Consensus Building as their decision-making approach. He wants full buy-in on all key decisions from the team. Someone asked how things will get resolved if they do not have consensus on a topic. The KDM said he would break any impasses, but these should be rare.</td></tr>
<tr><td>DISC Review</td><td>The facilitator will bring the following reports for discussion in this session:

Tent Cards: Example tent card:



The DISC tent card generated for all SLT members are [located here](#).

DISC Wheel: Here is the DISC wheel for ContractCo:</td></tr>
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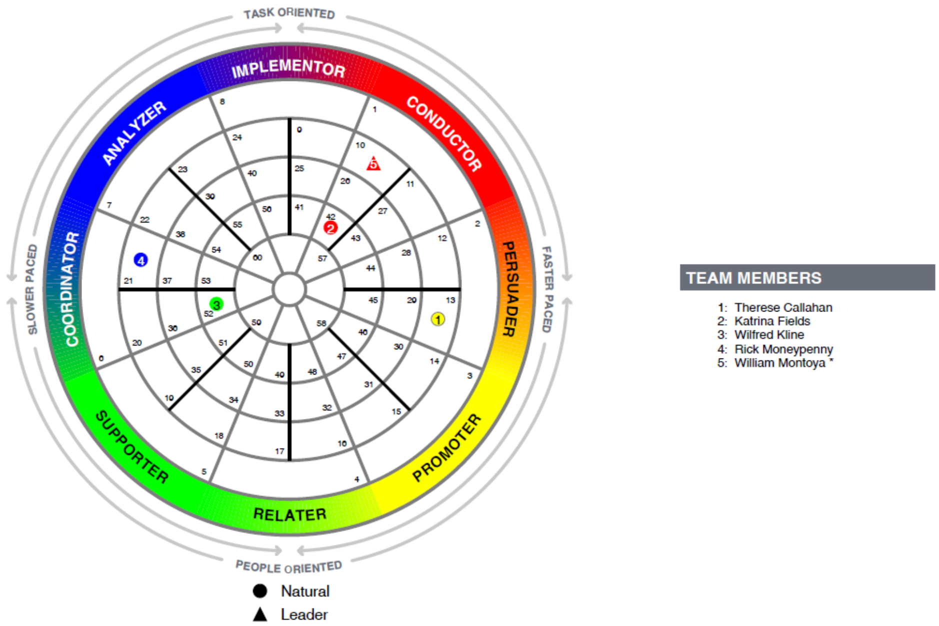


The DISC wheel is contained in the DISC team report. The DISC Team Report contains insights on the team overall. The DISC team report is located here.

Short DISC Reports:

The short DISC reports are used in this workshop. These reports contain a small subset of the pages from the full report. Various exercises are used based on the short reports. See the Leader's Guide for details.

The short DISC reports for ContractCo are located here.

Full DISC Reports:

The full DISC reports are handed to each SLT member at the *end of* the workshop.

The full DISC reports for ContractCo are located here.

DISC Communications Summary:

This is one-page summary of the Ways to Communicate, Ways NOT to Communicate and Ideal Environment for the SLT. It is in a matrix

	format. It provides a handy reference for all SLT members to see everyone's communication style. The DISC Communications Summary for ContractCo is [located here](#). The output of this exercise is a **Communication Effectiveness Improvement Plan.** This includes commitments each SLT member makes for improving their communication: The Communication Effectiveness Improvement Plan will include: ● Behaviors the SLT overall commits to improving. ● Behaviors the SLT overall commits to stopping. ● Behaviors individuals commit to improving. ContractCo is primarily comprised of Dominators and Coordinators. They realize that this causes frustration in their meetings since these styles are at odds with each other. The ContractCo team identifies the following improvement areas: ● Balance passionate debate with fact-based discussion ● Keep the emotions tempered in the discussions. ● Focus on decision outcomes. Debate is good but decisions need to be made. ● Show up as people. Have some fun. As an example of an individual improvement plan, Wilfred Kline identified the following improvement areas: ● Avoid "analysis paralysis". ● Show more enthusiasm for successes and support other team members. ● Be more direct. Other SLT members share similar commitments.
Communications Commitment Exercise	The facilitator led a discussion with the SLT to assess the behaviors that raise their armor and the behaviors that reduce their armor and allows them to bring their "best selves" to a meeting. This resulted in the following charter. *To provide the very best communication environment for business transformation, we established a communications charter that members of the SLT commit to following – both in workshops and*

	outside workshops. We identified a list of unproductive behaviors to avoid and a list of productive behaviors to follow and promote. *We commit to NOT doing the following "below the line" behaviors that cause us to raise our armor:* ● *Side conversations* ● *Overly aggressive behavior* ● *Attempting to control* ● *Appearance of favoritism* ● *Withholding facts* ● *Overly emotional responsiveness* ● *Not listening* ● *Grandstanding, overselling/persuading* ● *Excuses* ● *Devaluing others' opinions based on years/experience* *We commit to fostering the following "above the line" behaviors which empower us to bring our best selves and perform at our highest collective level in meetings:* ● *One conversation at a time* ● *Respectfully interacting, even when we disagree* ● *Listening generously* ● *Debating the ideas and not the person* ● *Having fun* ● *Checking our phones/email only at scheduled breaks* ● *Supporting overall company objectives, rather than our individual group objectives* ● *Being fully present* ● *Preparing ahead of time* *When someone acts below the line, other team members will say "Ada" to remind them to act above the line.*
Greatest Takeaway	The SLT members identified the following takeaways: ● Katrina: Understands the reason for some of her frustrations with the team's poor communication. ● Rick: The team was speaking about things they don't normally discuss. ● Therese: Had concerns about the time commitment and value coming in. Feels optimism that the team work better together. ● Wilfred: Glad to work on softer issues of the team but looking forward to tackling important business challenges.

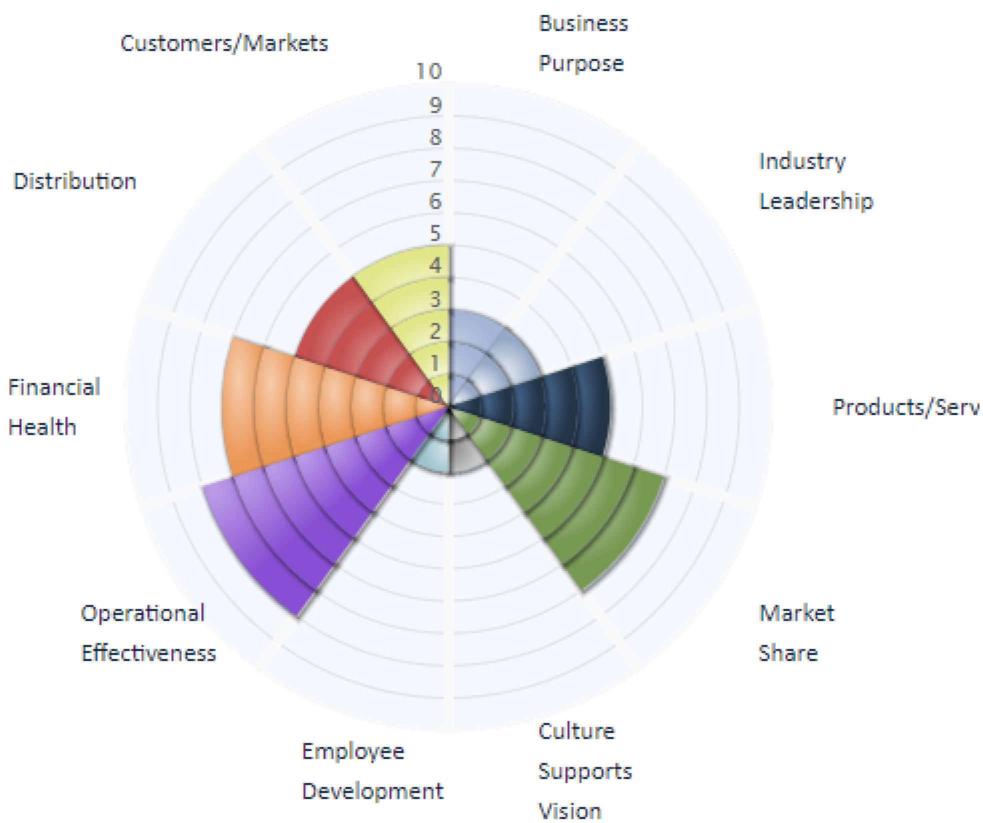
	• William Montoya: Exceeded his expectations. Feels optimistic about what the team can achieve.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. The facilitator explained that she'll send the following exercises to the SLT and they must complete them in advance of the next workshop: • Organization Vision Exercise • Values and Culture Exercise • Common Accountabilities Read StratPro book section 2.

Vision and Culture Workshop

<table>
<tr><th>Exercise</th><th>Results</th></tr>
<tr><td>Vision Pre-Work</td><td>All SLT members read StratPro book section two and completed the Organization Vision as a Google Form. Each person rated each area of the organization vision balance wheel. They also suggested up to 3 specific inputs that should be included in the Organization Vision Statement.

The Organization Vision pre-work exercise form is located here. Once the form has been completed by all SLT members, the facilitator runs a report to generate the average wheel scores and the collective statement inputs from the SLT members. Four SLT members completed the Google Form. The responses were generated into a spreadsheet: located here.

For ContractCo, the following average scores were provided:



The following are some of the inputs provided by the SLT for the Organization Vision Statement in the pre-work exercise:</td></tr>
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	● "Go To" Colorado company for contract manufacturing ● Utilize leading-edge – but not bleeding-edge – equipment ● Has a positive employee culture ● Expands into other states ● Build our own electronics product line ● On-time and high-quality work, all the time
Organization Vision Exercise	A typical Organization Vision defines where the organization intends to get to in the future. It focuses on what the SLT intends the organization to become in 3, 5 or 10 years. ContractCo chose a 5-year vision. Note that some of the pre-work inputs did not make it into the vision. The SLT debated all the items and decided that some things, like expand into other states, was not something they wanted to pursue. Here is vision statement: *ContractCo is the go-to Colorado company for high-quality electronic contract manufacturing solutions. By fostering a positive culture where employees feel valued and work as a team, we delight our customers by producing the best quality products and provide the best service. We utilize leading-edge (not bleeding edge) equipment to deliver cost-effective, customized solutions on time, every time.* *ContractCo's IO 9001 certification gives their customers high confidence in their work. ContractCo is superior to other local competitors due to consistency of product, on-time deliveries and commitment of staff.* Note that the facilitator asked the "stress test questions" to help shape this into a great vision statement.
Values Pre-Work	Each SLT member completed the pre-work resulting in 25 potential values. The facilitator reviewed the list, identified duplicates and took some small liberties to reduce the list to a dozen. ● Above and Beyond ● Be Adventurous, Creative and Open-Minded ● Be Passionate and Determined ● Clients Come First ● Embrace Challenges with Optimism ● Every Client. Every Time. ● Foster Collaboration & Teamwork ● Safety and Cleanliness Always ● Satisfy and Delight our Customers

	● Strong Work Ethic ● Whatever We Do, Do It Best ● Work Hard. Have Fun. The facilitator prepares this into a list and takes it into the workshop.
Values Exercise	ContractCo had a list of values posted on the walls. The KDM realized, in discussions with the facilitator, that not a lot of thought went into these values. The KDM quickly created them years ago and hasen't given them much thought recently. Therefore, he agreed to start from a clean slate. If the KDM wanted to retain their existing values, the facilitator would have added them to the list. The facilitator thanked the SLT for completing the exercise and handed out the list of twelve values. The facilitator explained that organizations should have not more than 5 or 7 values and some organizations identify only 3 really important values. After some discussion from the team, they removed 4 of the values. That left 8. The facilitator led an exercise where each SLT member voted on the top 3 from their perspective. This resulted in a list of 5 values. The facilitator asked the "stress test questions". One of the 5 was "Every Client. Every Time." The KDM felt this was too vague for employees to relate to. He said he was using his role as leader of the organization to use "Satisfy and Delight Our Customers" instead. The SLT seemed satisfied with the list. This resulted in the following list of values: ● Satisfy and Delight Our Customers ● Whatever We Do, Do It Best ● Embrace Challenges with Optimism ● Safety and Cleanliness Always ● Work Hard. Have Fun.
Culture Statement Exercise	The next exercise is to create the Culture Statement. The facilitator explained that values are important, but in many organizations, the employees cannot always follow the values in their work since they don't know how they relate to their work. The purpose of the Culture Statement is to craft a short statement that "brings the values to life" and make it more likely the employees will follow those values.

	The SLT struggled with getting this exercise going. The facilitator went one by one around the room and asked each SLT member to elaborate on how a typical employee would live one of the values. She captured phrases on the whiteboard. She captured about a dozen phrases. It didn't look like much of a Culture Statement but she felt that the concepts were captured. She asked for a volunteer and Wilfred agreed to take a cut at crafting a statement and sending it to the SLT. After some iteration, after the workshop, they agreed on the following: *At ContractCo we work and succeed as a team. We are passionate about the success of our customers, our employees and ContractCo. We support each other and have a shared sense of urgency. Our relentless attention to quality produces high-quality products that we are proud to produce. We respect each other and our communication is always positive and constructive.* *In our business, our most important assets go home every night. Great ideas can come from anywhere. ContractCo is a business were people would want to work and be their best selves.*
Brand Promise Exercise	The facilitator pointed out that they are nearly at four hours. She asked whether they wanted to go a little longer or wrap things up and schedule more time to finish the workshop. The team agreed to spend one more hour and then wrap up. Some organizations will create a Brand Promise and others will not. The facilitator explained that the Values and Culture Statement reflect how the employees should interact with each other. The Brand Promise will reflect how a customer experiences those values when interacting with the organization. The SLT saw the value in creating a Brand Promise. The facilitator led an exercise very similar to the Culture Statement. This eventually resulted in the following Brand Promise: *Our promise to our customers is that they will receive a high quality, on-time shipment of their custom orders, every time, at a fair price. ContractCo is a frictionless organization to do business with. Our customers are the reason we exist, and they will feel genuinely valued and appreciated in all interaction with a ContractCo employee. In the rare case where something goes wrong with an order, we will make it right and*

	the customer will continue to believe they are working with the very best organization for their contract manufacturing orders.
Mission Statement	Katrina asked why there was no Mission Statement. She said this motivated her in previous companies. The facilitator explained that for most smaller businesses, too many concepts can be confusing to the employees. Instead, her experience is that having a really strong Vision Statement along with Values are most important. She also offered that if they want to craft a Mission Statement, that is fine. Katrina said that she would draft something and bring it to their next leadership team meeting. She said that this workshop has inspired her to do this and she appreciates that.
Greatest Takeaway	The SLT members identified the following takeaways: ● Katrina: She found the workshop "exhilarating" to start working on these really important issues. ● Rick: He always rolled his eyes at these kinds of things but now sees the importance. ● Therese: It's starting to feel like a different organization. ● Wilfred: This was a good use of their time. ● William: Loves the brand promise and will share this with new prospects.
Additional Workshop	After almost five hours of intense discussion, the SLT was ready to wrap up. The facilitator noticed that a few of them were getting less engaged and were checking their phones. She asked whether the team could reconvene next week for about 90 minutes to develop the Accountability Chart. They agreed and checked schedules to confirm a time.
Change to SLT	The KDM pulled the facilitator aside after the workshop. He said that he is going to remove Rick (the accountant) from the workshops. Rick has been most quiet. He has not really contributed strategic ideas and has made slightly cynical comments outside the workshops. He also works part-time and the KDM is worried he'll use the workshops as an excuse not to get his tasks done. The facilitator explained that this is a normal outcome of the workshops. StratPro is about "transformation". Not all managers in a company are strategic in nature and able to play a significant role in transforming the organization. She sees this as a plus, that the right team of committed and strategic team members will be in the room for future workshops.

Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. The homework is to review the Common Accountabilities document to prepare for the Accountability Chart discussion and read the Strategic Advantage Workshop chapter from the StratPro book.

STRATPRO

Vision and Values Workshop (continued)

Exercise	Results
Pre-Work	The SLT reviewed the Common Accountabilities document to prepare for the Accountability Chart discussion. They read the Strategic Advantage Workshop chapter from the StratPro book.
Accountability Chart Exercise	They started with ContractCo's existing org chart. There were names on the chart of employees long gone from the company. They decided to create an Accountability Chart with the SLT members and other leads. They decided not to include every technician. Theresa argued that this might make the other employees feel disrespected. They decided to only include anyone in a leadership position since there is inherently turnover in their type of business and the chart will quickly become outdated again. The facilitator decided to work at the whiteboard rather than directly in the Blueprint. She came early and drew the existing org chart on the whiteboard with room to add the key accountabilities. At the beginning of the workshop they collectively modified the chart to reflect the latest staff names and titles. The facilitator led a discussion for the SLT members to identify the key accountabilities needed at ContractCo. She asked them not to get too caught up in how things are working now. Instead, she asked them to refer to the Common Accountabilities document and also use their own experience to identify the accountabilities that someone needs to own at ContractCo. The SLT started to shout them out. Once they identified about 20 of them, the facilitator led a discussion to start to organize related accountabilities into common roles. There was no name or title attached to the roles yet. It was just to get them organized. Once the different roles were identified, this led to identifying additional roles that needed to be included. The team came up with the following roles and accountabilities: CEO: ● New Equipment/Capital Purchases ● Risk Mitigation

	• Strategy • Profitability • Management • Facilities Business Development: • Product Delivery • Scheduling • Order Entry • Customer Service • New Sales • Quoting Turnkey Jobs • Quoting Custom Jobs Operations: • Production Control • Scheduling Production • Programming Equipment • Training • Maintenance/Equipment Repair • Production Supervision Material: • Shipping • Receiving • Inventory • Purchasing Quality Assurance: • Return Merchandise Authorization • ISO • Quality Accounting: • Cost Accounting/Job Costing • AR/AP • Taxes • Payroll • Finance/Accounting

	Human Resources: ● Culture ● Employee Development ● HR/Hiring While these roles will naturally fit pretty well with how they are organized, the KDM said they would continue the discussion outside the workshop about who slots into these roles and perhaps adjusting the accountabilities a bit. The KDM said he will build out the Accountability Chart in the Blueprint once they discuss it further to finish it off. The facilitator explained that it is ok to have the same person fill multiple roles in the Accountability Chart; it is also ok to keep the name blank and hire someone into this role in the future. The facilitator asked the "stress test questions" to confirm the resulting Accountability Chart is the best fit for the organization. This results in several adjustments. See the Business Builder's Blueprint report for ContractCo for the Accountability Chart with included accountabilities for each key role.
PAVE Introduction	The facilitator introduced the SLT to the PAVE Exercise. She explained the process of evaluating each employee against the PAVE criteria, along with the values. She took led the discussion to do a PAVE evaluation of a particular employee. The SLT confirmed that they will complete the exercise for reports in their areas and will meet as a team to discuss and agree on the evaluations. Here is a link to the PAVE Exercise for ContractCo where a few employees are evaluated.
Greatest Takeaway	The general spirit of the comments was that this provided greater clarity in the key roles in the organization and that it also identified some key accountabilities that no one was clear on. It was a good use of time. several members were worried about the PAVE exercise and the impact to their staff. The facilitator offered to facilitate a workshop on PAVE if they'd like. The KDM said they will give it a go first, and if they need help, call her in.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. The SLT was assigned the PAVE Exercise with Values for each employee, and the Strategic Advantage exercise.

	Once the Accountability Chart was drafted, the facilitator confirmed that all SLT members had login/edit access to the Blueprint. Read the "Business Diagnostic and Critical Success Factors Workshop" section in the StratPro book.

STRATPRO

Strategic Advantage Workshop

Exercise	Results
Pre-Work	The facilitator sent the Strategic Advantage exercise to the SLT ahead of time. This exercise prompts for SLT members to provide inputs on each section of the Strategic Advantage: ● Three areas of value delivered to the customer. ● Three differentiators over key competitors. ● Freeform inputs into each section of the Unique Value Proposition. ● Freeform inputs into the Positioning Statement. The Strategic Advantage pre-work exercise results are located here. All SLT members read the "Strategic Advantage" section in the StratPro book.
Customer Segmentation Exercise	For companies with multiple customers segments and offerings for those segments, the SLT can complete multiple versions of the pre-work exercise for each customer/offering. ContractCo does have different segments in that some of their customers have high volumes of more simple, repetitive products and others have a lower volume of more complex, customized products. Their desire is to have more of the high volume, routine jobs. These are easier for them to staff and deliver and are more profitable. So as not to make this exercise too complicated, they decided to identify a single customer/offering Strategic Advantage. They believe the value proposition that they offer is similar for both customer segments. The facilitator led a discussion on how to define this segment. The better defined, the more relevant the messaging can be. After a lot of discussion, the SLT arrived at: *"Business, medical and government clients with small-to-medium volume, custom electronic hardware product requirements, located within 120 miles of our offices."* While ContractCo could handle high-volume jobs, they specialize in smaller volume because customers will look to offshore contract manufacturers for high-capacity jobs. The sweet spot for

	ContractCo is smaller volume runs, where offshoring is not economically attractive. ContractCo does occasionally support customers in other states, however, 90% of their business is local. As long as they can keep sustain or grow their business with local clients, this is their preference.
Key Product, Service & Differentiator Exercise	**Value:** The facilitator handed out the Value outputs from the pre-work. Value identifies the value a customer receives from using the product or service. The facilitator explained that she saw multiple occurrences of *features* in the list, rather than the value from a customer's perspective. They reviewed each input from the pre-work inputs and removed those that were features. This resulted in a list of 9 values. They then discussed which of those values are significant in the customer's eyes. The following list of values was created: ● Fast turn-around time, allowing customers to meet change demands from *their* customers. ● Confidence that the products will work as designed. (Not there yet but this is what customers expect.) ● Flexible, especially if the customer makes a mistake in the order or needs to make a spec change. ● Trust, especially knowing the people making their products. **Differentiators:** They next moved to differentiators. The facilitator explained that, simply put, differentiators identify why a customer would purchase their product/service from you, rather than another provider. The first step is to identify the competitor. ContactCo competes against several local contract manufacturers, however, their greatest competition is from offshore firms. While they lose some jobs to local competitors, they are happy with their local competitive position. Their more significant competition is offshore firms. They decided that they will concentrate on offshore competitors. The facilitator handed out the Differentiators output from the pre-work. She found a lot of repetition. This is a good thing since the SLT seems to be well-aligned on understanding their competition. They reviewed and discussed the inputs, and fairly quickly landed on the key differentiators. These are similar to what they identified as the Value to their customers. ● Speed. ● Flexibility.

	• Quality. This is becoming less relevant as the offshore companies improve their quality. However, in the customers' minds, they see this as a differentiator. • Local. Some customers could get the product a little cheaper offshore but they like the "made in the USA" label.
Unique Value Proposition Exercise	The facilitator handed out the summary of the pre-work for the Unique Value Proposition (UVP). This pre-work is less valuable than the other pre-work because of the work previously done in the workshop. The results of the Value and Differentiators exercises are the primary input into the UVP. The facilitator stepped through each section of the UVP with the SLT. As she moved to each section, she asked the SLT to review the pre-work input. While this may not be used heavily in creating the UVP, it should still help with the thinking of the SLT. The facilitator guided the discussion in each section of the UVP. This required a lot of editing. Someone makes a comment that gets recorded, then someone builds on this. It can either be done right in the Blueprint or on a whiteboard. They used the whiteboard. This exercise resulted in the following UVP: **For…** business, medical and government clients with small-to-medium volume, custom electronic hardware product requirements **Who…** require fast, flexible contract manufacturing solutions **Our service…** is a custom contract manufacturing service **That provides…**highly customizable, quality jobs **Unlike…**offshore contract manufacturing alternatives **We…**provide high-quality, fast turn-around jobs, delivered by a local team. The facilitator asked the "stress test questions" which confirms that this is a good UVP for ContractCo.
Positioning Statement Exercise	The facilitator explained that the Positioning Statement is a concise version of the UVP. It boils the UVP down to a single sentence or two about who your product is for and how it is different and better than competitive products.

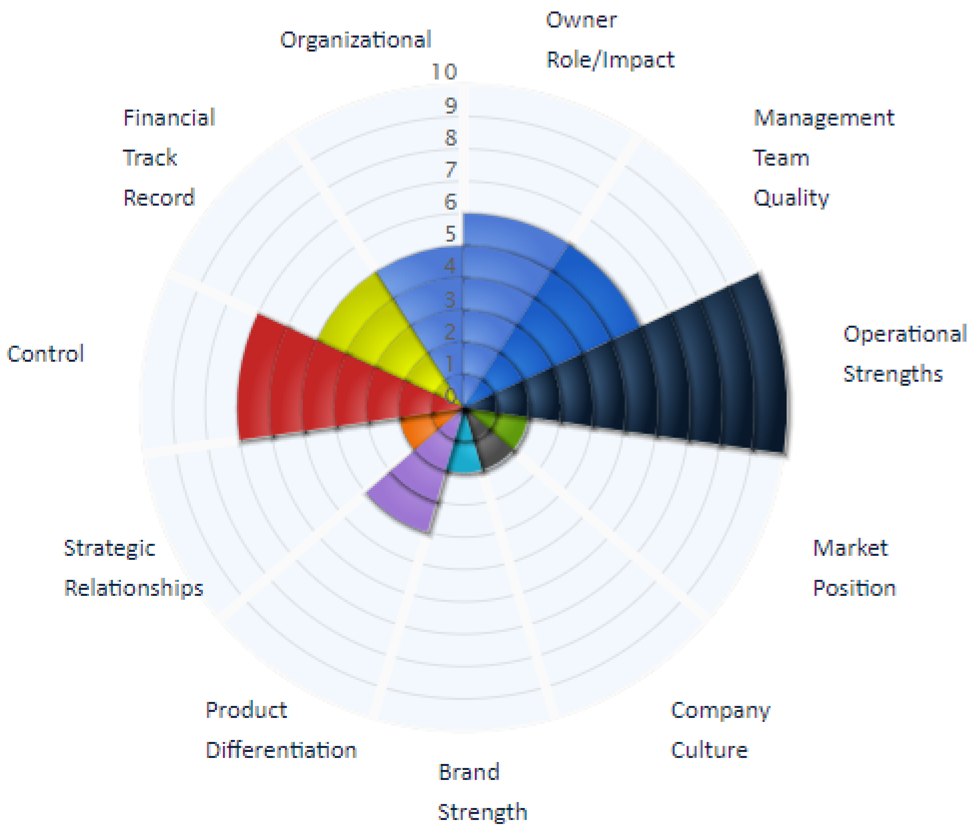
	The SLT started discussing this and then Therese, who leads business development, jumped up and decided to take a cut at it. Especially since she speaks with customers a lot, she both valued this work and also felt she has a lot to contribute. Other SLT members contributed as it was being developed. They drafted the following: *ContractCo is your premiere, local partner for fast, high-quality, custom electronics contract manufacturing solutions.* They didn't think they needed to explicitly contrast them with offshore competitors because their points of differentiation are included.
Greatest Takeaway	The team was very upbeat leaving this workshop. No one said it directly but the feeling seemed to be that a smaller, more engaged SLT was more collaborative and productive.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. She explain that the Business Diagnostic will be sent as pre-work. They will also be sent an exercise to provide input to the SWOT analysis. Read the "Risk Assessment and Mitigation Workshop" section in the StratPro book.

Organization Diagnostic Workshop

Exercise	Results
Pre-Work	The SLT was meant to complete the PAVE Assessment for their employees, complete the Business Diagnostic and think about the SWOT. The KDM completed the Accountability Chart in the BBB. The SLT members read the "Risk Assessment and Mitigation Workshop" section in the StratPro book.
Finalize PAVE Assessment	This exercise got off to a poor start. They didn't complete a PAVE assessment for 6 employees. Some of the team felt that some other SLT members did not all approach this exercise with the same level of professionalism. There was also discussion that some employee evaluations were done without much thought. Before going too deep, the facilitator decided to take a step back and explain the importance of this exercise. She explained that you can't transform the business without seriously evaluating the staff. It's unlikely that every employee is a high-performer and a great cultural fit. It's one of the basic facts of business that high-performing organizations evaluate their staff and make changes from time to time to ensure they have the best team in place. Wilfred brought up that it is so hard to find capable people, especially at the wage scale they are at. This is a highly competitive business. He said he has concerns about the skills of multiple employees and concerns about the cultural fit of 3 particular team members. However, he looks the other way due to the difficulty finding people. The KDM stepped in and explained that they have been trapped by key employees. They all know that culture is a real problem but they've not been willing to address employees who undermine the culture. He explained that he is serious about achieving the vision they created and the culture to support it. To this end, they need all staff with the right skills and the right cultural fit. He doesn't think this means firing a bunch of people necessarily. But it does mean starting with an honest examination of all employees. They start to go through the spreadsheet, name by name. they generally agreed on the assessments but made some adjustments. They debated Monica the most. She is good at what she does. However, she has been doing the same thing for years and has not grown her skillsets at all. Moreover, several SLT members identified

	her as the poorest cultural fit. Katrina brought her in from a previous company so felt the most loyalty to her. She had to admit that what the other team members were saying was true. The team quickly assessed the fit of the other 6 employees who had not been assessed. There was some conflict in this section. Therese said Katrina was trying to "protect her friends". Wilfred called "Ada" on this. Given how much time this took, especially doing brand new evaluations of some employees, the KDM said they would complete this outside the workshop. He got the SLT to agree to recommend an action plan for anyone who does not have at least a 7 in each PAVE and Value area. The action plan could range from training to termination. The KDM set a deadline for one week and the SLT scheduled a meeting to review the recommendations. The KDM said they would make decisions on next steps in that meeting.
Business Diagnostic Pre-Work	ContractCo is big and complex enough to warrant assigning all diagnostic categories. To keep it manageable, the facilitator used the small company version. The facilitator scheduled a short call with the KDM right after the last workshop to do the prioritization. They also reviewed the optional categories and decided to add Leadership and Planning to Sell Your Business. The facilitator entered the priorities, assigned the optional categories and assigned the diagnostic to all SLT members.
Review Business Diagnostic Results	The facilitator handed out the **Business Diagnostic Gap Report.** This report plots Priority vs. Performance for each category. The categories that are high priority but lower performance are most important. The team agreed that Marketing (they don't do any), Internal Communications and Planning are the greatest gaps. Of the optional categories, the team found that they scored pretty well in the Leadership section but not in the Selling the Business section. Therefore, they identified the following categories as areas of focus: ● Marketing ● Internal Communications ● Planning ● Planning to Sell Your Business The facilitator handed out the **Business Diagnostic Analysis Report** for all areas; but they reviewed the reports for just those four areas. They briefly reviewed the Strengths but concentrated on the Weaknesses in these areas. The main weaknesses identified were:

	• Their website is really old and they no longer get inbound leads. • They have happy customers but do not leverage them for referrals are testimonials. • The communication with the team is infrequent and informal. They worry this does not show respect for the employees. • The employees do not understand the vision and goals of the organization. They realize that the employees will help get there if the plans are shared with them. • The organization is run much too tactically. The Ada workshops are turning that around. • Too much work and decisions go through the KDM. He has not delegated well at all.
SWOT Pre-Work	The facilitator apologized at the last workshop about so much pre-work but assigned the SLT the SWOT Exercise as well. The Google Form allows each SLT member to score each part of the SWOT wheels and for the facilitator to easily get the average scores. See the Blueprint report for ContractCo for the average from this exercise. The SWOT Exercise also allows each SLT member to enter up to 3 inputs for the Strengths, Weaknesses, Opportunities and Threats. The facilitator enter both the average balance wheel scores and the inputs for each area into the Blueprint and brought this in as a handout for the SLT. Here is a link to the pre-work responses.
Create SWOT Assessment	The facilitator reviewed the Strengths/Weaknesses balance wheel first.



They were surprised to see that the team was generally critical of the Management Team Quality. They also were confused by Brand Strength ranking high. They discussed these and ended up increasing the Management Team Quality ranking and reduce Brand Strength, based on the brand being largely unknown.

The facilitator walked the team through the Strengths. She advised that it is more impactful if an organization has a small number of superior strengths rather than a laundry list of strengths that aren't differentiators for them. The team arrived at the following strengths.

Strengths:

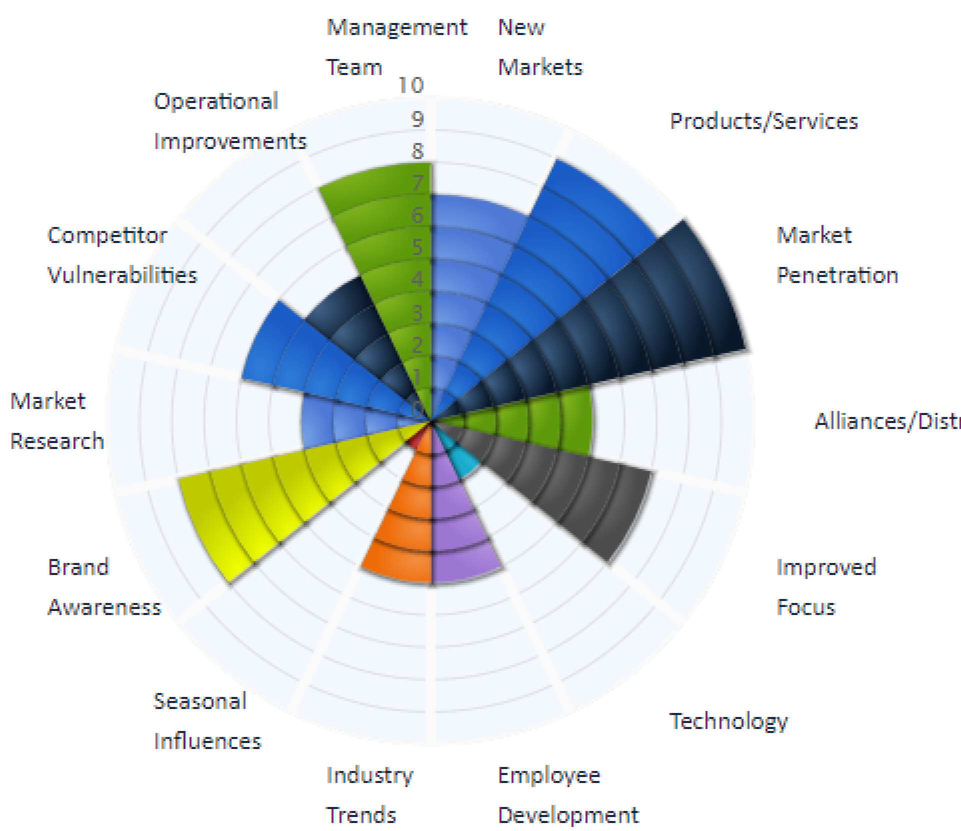
- Long-term, loyal customer base
- Length of time in business; stability
- Low amount of fixed expenses
- Flexible with our customers - we are easy to do business with

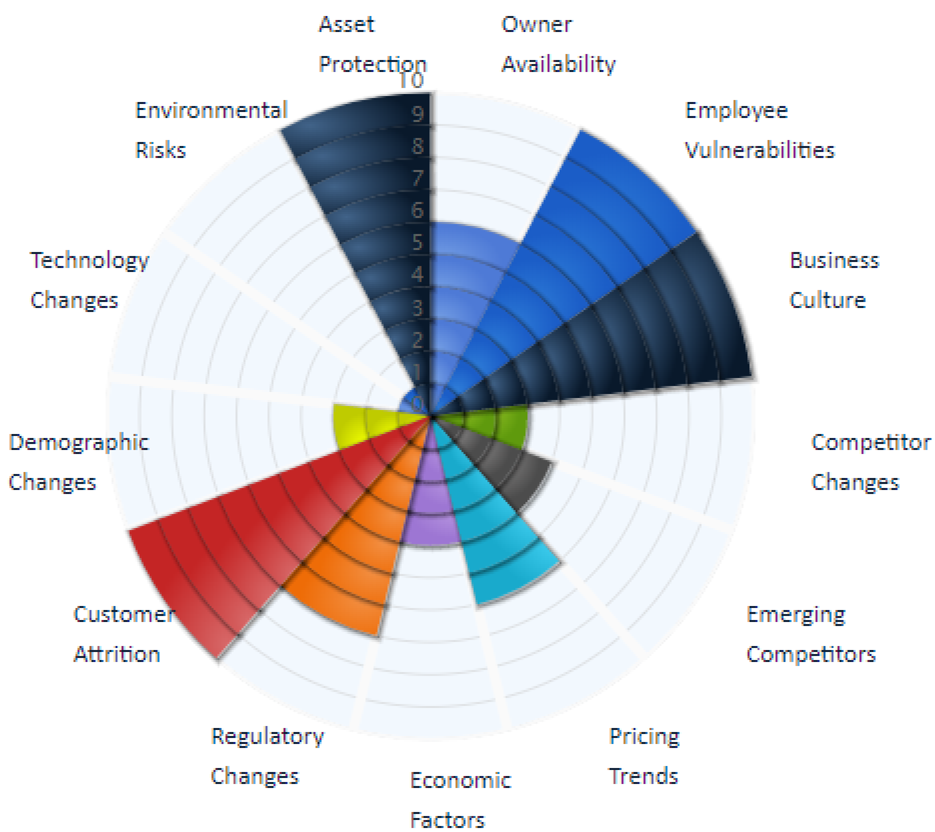
Similarly, they identified the following weaknesses. This primarily came out of the business diagnostic discussion.

Weaknesses:

- Website is really old and they no longer get inbound leads.
- Have happy customers but do not leverage them for referrals or testimonials.
- Communication with the team is infrequent and informal.
- Employees do not understand the vision and goals of the organization.
- The organization is run much too tactically.
- Too much work and decisions go through the KDM. He has not delegated well at all.

The facilitator repeated this exercise for Opportunities and Threats. The following are the outputs. The facilitator also handed out the "Single Biggest Issue" results from the Introductory Workshop. This influenced the Opportunities quite a bit.



	Opportunities: • Need to improve culture • Improve consistency of work quality • Diversify customer based to reduce dependency on two large customers • Add additional staff into key roles • Create redundancy in the organization to cover key areas if staff depart • Complete ISO certification  **Threats:** • Quality of offshore contract manufacturing is improving • Too many staff will retire in next five years • Competitors with greater process maturity will take away some of their business. The facilitator asked the "stress test questions".

Generate Critical Success Factors	The pre-work exercise is located here. The facilitator led a discussion to identify the critical success factors. She had them view the Vision, the Values and Culture and the SWOT Statements. This was a hard discussion for the SLT. They wanted to develop a laundry list of things to work on. The facilitator explained that the CSFs are a small number of highly important factors for achieving their success. After a lot of healthy discussion they arrived on the following list. • Make a "quantum leap" in quality • Create and implement sales program to significantly diversify customer base (DCSF) • Implement organizational changes to provide options for exiting the business • Build a culture where employees love coming to work • Develop systems and processes to increase efficiency & profitability They identified the customer diversity CSF as the Driving CSF. Unless this is solved, the business has too much risk. The facilitator asked the "stress test questions".
Greatest Takeaway	The SLT complained a bit about how much pre-work there was. The facilitator apologized again. This workshop has the most pre-work by far. The other key take-away was that they feel optimism that they are moving towards a more tangible future strategy. The previous workshops were good but they had a difficult time seeing how those exercises will lead to transformation. They said identifying the CSFs went a long way to bridging high-level aspirations to something more concrete. Wilfred agreed that the workshops have been helpful but asked about when they are going to start taking action. The facilitator explained that with this type of transformation, acting too quickly can be counterproductive. She also reminded them that the commitments identified along the way are concrete things they have been doing. She asked them to look at the CSFs and see if there was something they wanted to work on. They said culture and the website. The facilitator led a short discussion to identify concrete steps they can take in next month to make some progress in these areas. They said they will review the website, identify a web developer and run a

	team meeting with all the staff to share the outputs from the workshops thus far, and to share the communications commitment. Katrina also asked the team to take a step back and think about what their pre-Ada meetings were like. She said "do you remember how awful they were?" She congratulated the team on how far they've come and how much better they are working together. She genuinely thanked the facilitator for bringing this to ContractCo.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. The team debated whether they needed the Risk Assessment and Mitigation Workshop. They felt like the discussion of weaknesses and threats surfaced a lot of those things in today's workshop. The facilitator explained that they can schedule this workshop for two hours. If, after 30-45 minutes, it does not feel productive, they can stop the workshop. The SLT agreed. The facilitator asked SLT members to review the Risk Management Overview document and complete the Risk Assessment Exercise. She asked SLT members to read the "Risk Mitigation Workshop" section in the StratPro book.

Risk Assessment and Mitigation Workshop

Exercise	Results
Pre-Work	The SLT members reviewed the Risk Management Overview document and completed the Risk Assessment Exercise. The SLT members read the "Risk Assessment Workshop" section in the StratPro book. Here are the pre-work risk and issue inputs from the SLT.
Identify and Score Risk Events	The facilitator projected a list of the potential risks identified by the SLT as pre-work. The team spent a few minutes reviewing the full list. One SLT member took the pre-work a little too far. She identified risks like "government collapses" and "building destroyed by natural events" as risks. These could happen. But the likelihood is very, very low. The facilitator asked the group whether their list should be a laundry list of all possible risks, or whether it should focus on things that have a material chance of occurring. The team arrived on the latter. This led to some good-natured discussion on outlandish risks. Once they were aligned on risk philosophy, they developed a list of about 15 risks to include. Some of the risk included: ● Reputational risk if an employee leaves on bad terms and rants on social media ● Legal risk if a product for the medical industry has a significant defect. ● Economic risk if employment remains uncommonly high and wages continue to increase ● Risk of a cyberattack ● Compliance risks if they do not achieve ISO certification The SLT was skeptical of the value of this workshop ahead of time but the KDM commented that he is really glad that are discussing these things.
Identify and Score Issue Events	The facilitator projected the identified issues as well. The facilitator included the issues that she has been recording from the previous workshops. Issues are different than risks because they are having a negative impact now because they are occurring. The discussion on this revealed some interesting issues as well, including: ● The spat between two employees who have stopped speaking to each other.

	● The upcoming meeting with a newer client who is very upset about quality issues with their last order. ● Fred's sickness is seeming to be more severe; need for several people to be trained as backup. ● They are severely underutilizing the customization capabilities of the new machine. ● They have not done job costing for a very long time and are sure their old metrics do not reflect current status. They felt that they generally knew the issues going on in the business but were not organized in tracking them and working on them. Someone called it "whack a mole issue management". They were a little overwhelmed with the number of risks and issues but were glad they took the time to formalize them.
Prioritize Risks and Issues	The SLT went through the process of scoring issues and risks. Each issue is scored a 5 as a likelihood since it has already occurred. Each issue was discussed and assigned likelihood and a severity. Each issue was assigned a severity. The facilitator brought in definitions of likelihood and severity to help the SLT if it seemed like they needed formal definitions. The SLT seemed to be well-aligned with how they approached likelihood and severity, so it was not necessary. The facilitator ordered risks and issues in order by "risk level", which is the product of likelihood and severity. Several SLT members recommended that they make some adjustments since the order didn't feel quite right. They made adjustments and were generally satisfied that it was a reasonable order.
Determine Strategy for Each Risk and Issue	The facilitator led the exercise to assign one of the following strategies for the top 10 risks and issues, based on risk level: ● **Avoid It**: This means to make a change that will eliminate the likelihood it will occur or will eliminate any negative impact. ● **Reduce It**: This is a mitigation strategy for risks or issues. The goal is to minimize the likelihood and severity, so the risk is no longer high. ● **Accept It**: This means no action will be taken to reduce likelihood or severity. The organization is resigning itself to accept any and all outcomes of the event. ● **Transfer It**: This strategy is most commonly applied in a contractual relationship. The organization transfers

	responsibility for addressing the risk to the partner organization. ● **Pursue It**: These are the opportunities that will be pursued. They commented that this is very helpful for them to think of risks and issues in this way. Not everything has to be pursued directly or immediately.
Assign Responsibility for Each Risk and Issue Strategy	The SLT assigned responsibility for each risk and issue to an owner. The facilitator explained that it doesn't have to be someone in the room. If there is someone in the company who is best equipped to manage a risk or address an issue, it should be assigned to them. They ended up assigning responsibility to a mix of people in the room and other key staff. See this Risk Register filled out based on this exercise.
Greatest Takeaway	The takeaways were all very positive. The theme was that they initially were skeptical about the value of this type of workshop. Yet, they found this workshop to be highly valuable. It was almost overwhelming to list out the risks and issues they face. But they also feel a great deal of confidence that by having it organized, they are going to be more successful managing it. They were glad this was a shorter workshop as well.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. The facilitator asked the KDM if he wanted to spend a few minutes in future workshops reviewing the risks and issues. The KDM said they should consider them as they develop their plan, but otherwise they will review them in their weekly leads meeting. There is no brand new exercise after this workshop. This is a really good time for the team to take a step back and to ensure all the previously assigned tasks are completed and to reflect on the work done to date. Specifically: ● If the PAVE and Values Assessment is not completed or there does not have full SLT buy-in, schedule time to complete this. Create an action plan for each employee that is not a perfect fit based on the PAVE and Values assessment. ● Ask SLT members to reflect on the SWOT Analysis from the previous workshop as well as the Risk Assessment coming out of this workshop. If they find any important items they

	believe are missing, bring those to the next workshop for discussion. ● Ask SLT members to reflect on the CSFs and DCSF coming out of the previous workshop. If they recommend any changes, bring those to the next workshop for discussion. ● Ask SLT members to identify Goals for the organization based on the CSFs. They can use this worksheet to submit their ideas. Ask SLT members to read the "Strategic Plan Workshop" section in the StratPro book.

STRATPRO

Plan Development Workshop

Exercise	Results
Pre-Work	Most of the pre-work was review. The facilitator did not ask for a strong commitment to propose goals. First, this is a good exercise for the team to work on together. Second, they've been doing a lot of work and pre-work, and she wanted them to primarily use any time they had to reflect on the work already done. SLT members read the "Strategic Plan Workshop" section in the StratPro book. For demonstration purposes, here is a link to an example pre-work exercise with a few submissions.
Review Company Vision, SWOT Analysis, and CSFs	The facilitator brought a Blueprint report that contained the Company Vision, SWOT and CSFs. The purpose is that the SLT needs to ensure these are all as good as they can be, and as aligned with each other as possible, before working on a plan to achieve the vision and the CSF. Moreover, approaching these exercises iteratively is important to getting the best result as well. ● The SLT said they absolutely love their vision, especially how vividly it conveys what a better future looks like. ● They made some edits to several parts of the SWOT Analysis. Nothing real significant but a few additional ideas came to mind that improved it. ● They examined issues and risks. No changes to the risks. The SLT was happy to report that two issues have been resolved; unfortunately, a new issue was surfaced. ● The CSF and the DCSF were validated and not changed. They debated whether to explicitly add ISO certification to the CSFs. The facilitator explained that their "quantum leap in quality" cover this conceptually and ISO certification seems more appropriate as a goal.
Determine Time Horizon for Strategic Plan	The facilitator led a discussion on the time horizon. She shared that companies typically target 3 years or 5 years for their strategic plan to be realized. Companies, especially larger ones, used to create 10-year plans. Things move too quickly these days. On the other, if a company sets the vision for a 1-year plan, this is too short a period to achieve a business transformed, especially since current operations takes up most of the time. ContractCo decided on a 3-year target. The facilitator brought up the organization vision statement and asked the SLT to read

	through it. She then asked whether they want to use a 3-year plan to achieve that vision. Their feeling was that it was very ambitious to achieve such a vision in 3 year, but they feel poised to make big steps in certain areas. The facilitator went around the room one-by-one and confirmed that each SLT member agreed to this timeframe. They locked in a 3-year time horizon.
Create Strategic Business Goals	The facilitator led a discussion about whether to concentrate on building out the entire plan for a single goal (going deep), or, going broad, and building out all the goals, then focusing on strategies, etc. As successful as the team was, most of them were not experienced at developing detailed plans. They were familiar with OKRs (Objectives & Key Results). They felt anything Google uses should be worth trying to adopt. They put together OKRs a few years ago and generally use the term but felt this was not integral to how they manage the business and are open to a new approach. They therefore concluded that working on the full plan for a single goal in this workshop is the right approach for them. The facilitator explained that the most important goal is the one that supports the DCSF. ContractCo's DCSF is: *Create and implement sales program to significantly diversify customer base* This CSF conveys that this is an important factor to the business but is not something a team can go out and do. For example, it does not explain, *Who will make this happen? By when? How do we know if it is successful? How do we measure it?* To answer these questions, we need to turn it into a SMART goal. Therese sighed louder than she meant to when she heard this. She said this was the kind of jargon she despised in the corporate world and was glad they used little of it at ContractCo. The facilitator said she appreciated the direct feedback and will try to use less jargon. She asked whether they need to create something more concrete that defines more concretely their goal for greater customer diversity. They agreed that the CSF was too vague. She asked them some questions. *What exactly needs to be accomplished? How do we measure success? Is it achievable? "I didn't say is it easy; but is it achievable?" Who owns it? And when is it going to be done by?*

	The SLT wrestled with it for a while. They tossed out some ideas. Some were accepted; others were challenged. They ended up defining the following goal: *By December 31st, 2021, ContractCo will earn no more than 20% of its topline revenue from a single customer. ContractCo will have at least 5 customers that contribute at least 5% of topline revenue each. Therese is the owner of this goal.* The facilitator thought this was a good goal. Therese quipped that she wanted to end the meeting now so she could head out and start working to make this happen. The facilitator asked the "stress test questions" for a goal. The SLT said they needed other goals, not just this one, but they would be thrilled if they were able to diversify their customer base by achieving this goal.
Develop Strategies	The facilitator braced herself for this exercise. Identifying strategies, based on the Blueprint process, was always difficult for Members to grasp. She explained that strategies are an intermediate part of the planning process. They are a way of taking a complex goal and simplifying it into smaller groups of tasks that can be assigned to get the work done. She suggested the SLT think of them as "buckets of work" to achieve the goal. If a goal identifies what needs to be done, the strategies identify how to go about achieving it. The SLT was confused. To get them started, she suggested a few possible strategies to get their thinking going. She said that if the goal is to diversify the customer base, then they might need to do this in a few ways: 1. Reduce the amount of work on the current flagship customer. The SLT didn't love this since they provided so much business. The facilitator said they may need to reduce their dependency a bit to diversify. 2. Grow existing customers into more significant revenue streams. Perhaps they can identify 3 current customers to grow to at least 5% of their business. This resonated. 3. Acquire new customers that can become significant revenue streams. This may involve developing some new skills or types of products. She said these are the types of strategies to consider. They do not define the specific steps on how to diversify but are three different

	approaches that could be ways to achieve the goal. For complex goals, multiple strategies are often necessary. The SLT liked all three. They decided to call their larger customers "Premiere Customers" so they had a label. This created some good discussion with the SLT and they came up with the following strategies: ● Grow at least 3 existing customers into Premiere Customers. ● Acquire at least 2 new customers who will grow into Premiere Customers. ● Eliminate low profit jobs from current Premiere Customers. ● Only perform jobs with at least 54% gross profit from non-Premiere Customers. The last one might not be exactly aligned with this goal but they were really happy about the insight of being more selective about the work they take on. Someone sad, "now this feels like transformation!" The facilitator asked the "stress test questions". The SLT were thrilled about the goal and strategies.
Develop Action Plans	The facilitator then moved to actions plans. Everyone understands action plans so the discussion is easier. They decided to work the strategies in order. The first strategy is: Grow at least 3 existing customers into Premiere Customers. The facilitator divided the SLT into pairs to brainstorm on action plans for this strategy. They came back together and each pair presented their actions. They found there was a lot of overlap. The facilitator said that for the rest of the strategies, they'll pair up, but each pair will work on action plans for a different strategy. After some discussion, the SLT arrived at the following action plans: ● Determine the criteria that make a Premiere Customer by the end of March. (Therese) ● Evaluate current customers and identify 10-15 customers who are candidates to become Premiere Customers. Prioritize the customers on this list. April 30th. (Therese) ● Pick the top 5 customers on this list and develop a strategy to convert them to a Premiere Customer. May 31s. (Therese)

	The lost a little bit of enthusiasm from earlier in the workshop because they realized that it will be quite hard to convert a normal customer to a Premiere Customer. This includes things in their control and things outside their control. The facilitator advised that having a plan is the first step and that you should only focus on those things you can control. They felt good that they have the right plan for this strategy. They repeated this process for several other strategies until they ran out of time.
Greatest Takeaway	The feeling was this was the best workshop so far. The previous workshops were great. But they have so much greater clarity than they've usually had. Moreover, they are working on the right things. The combination of having a concrete plan to address the big challenges and aspirations gives them a feeling optimistic.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. The facilitator asked the SLT to work on building out other goals, strategies and actions outside this workshop. The KDM said he is committed to building out the plan. Katrina expressed concern that having the facilitator has been really helpful to making so much progress. She said she is worried that on their own, the progress will slow down. The facilitator reminded them that they have a decision-making process, a communications agreement and a generally positive team spirit that should allow good progress. She also said that if they get stuck, they can work it out in the next workshop. She also assigned the KPI Exercise. She briefly explained lead and lag indicators and explained the exercise organizes the KPIs into the key areas of the business. She said just get ideas down and they'll work on them together. She also asked them to review Goals, Strategies and Action Plans. She asked SLT members to read the "Key Performance Indicators (KPIs) Workshop" section in the StratPro book.

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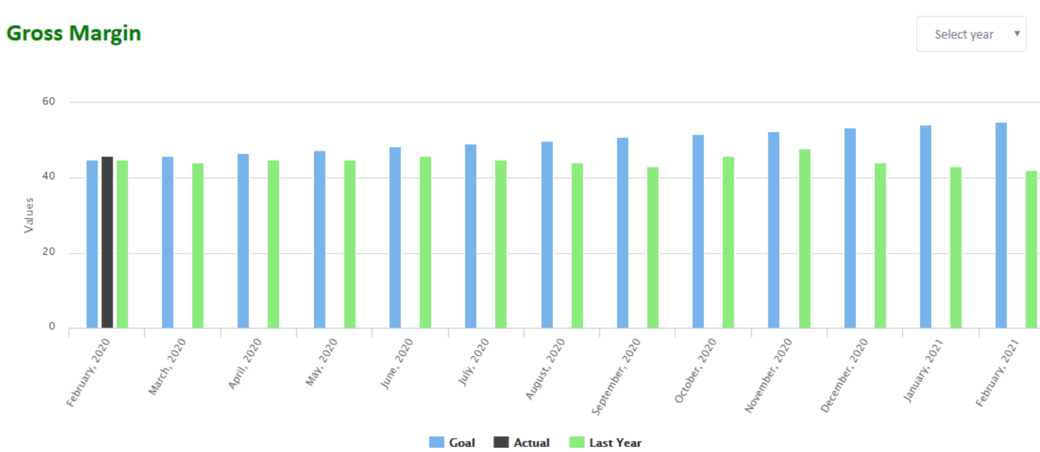
KPI Workshop

Exercise	Results
Pre-Work	The SLT members completed the KPI Exercise with some initial thoughts. Some of them said they reviewed the Goals, Strategies and Action plans but it sounded like this was casually at best. SLT members read the "Key Performance Indicators (KPIs) Workshop" section in the StratPro book. Here is a link to the pre-training work completed by several SLT members.
Review Goals, Strategies and Action Plans	The facilitator walked through the goals and asked the SLT whether these were the right goals for ContractCo. They were still quite enthusiastic about the goals and the plan in general. She then walked through the strategies. In reviewing the plan the day before, she noticed that the SLT did some additional work on the strategies. In particular, all the goals had assigned strategies. She personally felt some were not crystal clear; especially with some of the jargon. She complimented the SLT for their work. They quickly reviewed the strategies to confirm everyone bought in. They identified a few missing strategies, based on the facilitator's comments, and added them. They also adjusted the wording to make it clearer. She then moved to action plans. The SLT did work on them but didn't get through them all. Some of the plans felt more like tasks than an action plan. Wilfred apologized. He said he was going to build them out for his areas but did not get it done. He said he would by the end of the week. The rest of the team seemed fine. The facilitator asked if that interaction was an improvement over how they used to work together. They said it was much better. They reviewed the rest of the action plans relatively quickly and made a few small adjustments. The SLT committed to building them out fully before the next workshop. The purpose of the review was to get the plan to the action plan level built out and confirm they buy into it. The facilitator asked the SLT the following questions: *Is there anything else that you recommend we add to this plan?* Other than the additional Action Plans to add, they said no. *Ok, so do we all agree that this is our collective working plan?* They said yes, at least for now. They said that things change, including their thinking. The facilitator said that she is asking whether based on available knowledge now, this is their plan. They confirmed. *Does this plan have your 100% support?*

	They said yes. *Once you walk out of this room, will you be a champion of this plan with your staff and the rest of the organization?* This struck a nerve with the KDM. He said that he felt that they agreed on things in the past, then found members of this team would say things that contradicted the agreement. The facilitator reminded him that this is a new day. The KDM calmed down but asked for 100% support outside the meeting. They agreed.
Develop Lag KPIs	The facilitator presented the KPI slides. It was very illuminating for the SLT. They found the story about the steel company to be fascinating. They also were highly confused about lead vs. lag. The facilitator said "*let's start with lag indicators, then move to lead.*" The KDM had supplied financial details ahead of time and the facilitator populated them into the StratPro financial spreadsheet. The KDM confirmed it was ok to distribute it. The facilitator projected the spreadsheet to the SLT. She also handed out a nicely formatted version of the KPI Exercise results, which indicated which submitted KPIs were lead and lag indicators. She started asking what are the key financial metrics that drive the business. They confirmed that it is gross revenue – so they have enough business to keep the full staff busy – and gross margin. Gross margin KPI from the Blueprint:  They also realize they should do a better job at tracking inventory. Each job has custom inventory so the metric would be aggregate value of inventory on site.

	The facilitator then asked about other non-financial metrics. They said the quality of work, measured as Customer Return Rate, and on-time delivery, measured by Schedule Attainment, are the two most important. The facilitator complimented them on having a small number of metrics that track the success of the business. She explained that these are all lag indicators. They are results from past activities. They cannot make any changes now that would affect these KPIs. The past results are what they are and cannot be modified. The facilitator asked the SLT to review the goals and determine if all the goals have at least one associated KPI. They realized that the KPIs discussed here did not cover their driving goal, which is to diversify their business. They added two additional KPIs to track the diversification of their business, and to not be overly reliant on a few customers. They then discussed the baseline and target for each KPI. They had baseline numbers for the financials but not the other KPIs. They arbitrarily said they wanted to improve each KPI by 10% per year. The facilitator advised that this was difficult to assess without having baseline numbers. They decided to discuss the confidence level of a 10% increase anyway. It fell a little flat without the baseline numbers. For the financial numbers, a 10% annual increase in revenue felt achievable and was done in 2 of the past 3 years. They realized that increasing gross margin probably could not be improved 10% each year. They also realized that for their type of business, there is diminishing returns. They felt like by raising prices and improving job costing, they think they could increase gross profit by 10% this year; but then 5% the next two years is a better goal. They said they had high confidence in the revenue and medium confidence in gross profit. They were ok with these confidence levels. They discussed confidence level of achieving a 10% increase in the other metrics. Several folks commented that "we have to" and "that should be a chip shot." But they realized that without baselines they don't know if it's too high or too low. The facilitator a recorded a commitment for the SLT to create baseline metrics for these KPIs in the next 60 days. William said he would assign this task to his accountant. The facilitator reviewed the "stress test" questions.
Develop Lead KPIs	The lead indicator discussion was more difficult. Finding lead indicators that drive lag indicators is generally a more difficult task. While it is always the case that you can identify *what activity to take* to drive better lag results, finding metrics for those activities is not always straightforward.

	The facilitator doesn't have a strong sense of what the lead indicators are for some of ContractCo's lag indicators. She trusts the process to bring them out. She decides to start with the Customer Diversification KPI. The (lag) metrics are to earn no more than 20% of topline revenue from a single customer and have at least 5 customers that contribute at least 5% of topline revenue each. To stretch their thinking, the facilitator explained that they can reach this type of metric but either growing existing customer accounts or shrinking their two largest accounts. They realized that they could do some shrinking from one of the accounts since some of their business is highly complex and done in smaller volumes. But, they want to concentrate on growing 3 other accounts significantly to achieve diversification. She then asked them what action they can start taking now to grow those 3 accounts. They identified speaking with the customer, exploring opportunities to earn more of their business, and expanding their technical capabilities to take on more business. She asked them which of those activities can be quantified. The SLT struggled for a while but they realized that they could track the bids they submit for these 3 customers. They set a KPI to increase their bids in dollar amount by 25% annually per customer, realizing they will not win them all. The facilitator explained how the bid amounts are leading metrics. The more bids they submit, the more likely they are to increase the amount of business from these clients, which is their ultimate (lag) goal. She asked if the bid amounts are predictive of the Customer Diversification KPI and whether ContractCo can also directly influence the bid amounts. They felt like they started to understand lead vs. lag better. They identified other lead KPIs. They created baseline and goal targets for each. They discussed a confidence level. They also confirmed that they have some work to do to produce more accurate baseline metrics. The facilitator asked the "stress test questions". See the Blueprint report for the sample KPIs.
Develop Scoreboard	This exercise is easier and ends the meeting on a more fun and creative note. The facilitator explained that a scorecard allows the team to know whether or not they are winning. It should be highly visible and serves as a source of information and motivation for employees. The SLT really bought into the concept. They talked about posting spreadsheets and even a big monitor in the manufacturing area. But they decided on building a large scoreboard themselves in the

	manufacturing area. It will mainly be a giant matrix with baseline, target and latest actual metrics. They decided to use some clever graphs like they use in pledge drives to display things visually when appropriate. Therese said she will lead this effort since she owns the Customer Diversification KPI. She said she will make sure she updates the scoreboard every Friday with the latest data.
Greatest Takeaway	The SLT unanimously said that understanding lead vs. lag indicators was their big takeaway. They had no idea of the difference and it makes a lot of sense to them. They said they will probably identify additional metrics to track as a result but feel like they are focused in the right direction.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. The SLT is to review the KPIs and the Organization Plan, confirm the KPIs are the right ones, discuss any adjustments, track down the baseline numbers and confirm the new targets. For the plan, the leaders of each area confirmed they will review their assigned areas with their teams and will build out the plan fully before the next workshop. SLT members to read the "Plan Execution Workshop" section in the StratPro book.

Plan Execution Workshop

Exercise	**Results**
Pre-Work	The facilitator was impressed that the SLT reviewed the KPIs and largely confirmed the work done in the last workshop, and significantly built out the details of the plan. SLT members read the "Plan Execution Workshop" section in the StratPro book.
Review & Prioritize Goals and Strategies	The facilitator explained that the SLT should think about this as their collective plan, not a group of individual plans from each leader. The plan coming out of this workshop is the plan that the SLT will execute. The facilitator explained that no one should be harsh in their comments or defensive. The idea is that, thus far, sections of the plan were individually developed. Now, the full team needs to weigh in. No question or suggestion is bad. The full SLT should leave this workshop believing that they have a great plan to transform the business. The facilitator introduced the exercises by explaining that most plans are too ambitious and do not get fully executed. This is due to the "whirlwind" of the business, where most of the effort in an organization is spent on day-to-day operations: marketing, selling, customers, product and people. When plans are put together,

	teams often overestimate the time they can put into improving the business. As long as a team realizes going in that they might not be able to execute the entire plan in the allocated time, that's a healthy way to approach it. The key is to have a really good handle on what the top priorities are and to focus primarily on them, especially at first. The SLT confirmed that the goal for the DCSF is the highest priority goal. They discussed the other goals. The facilitator guided a voting exercise to pick the next two goals. They reordered the goals in the Blueprint, using drag and drop, to put them in priority order. This narrowed their focus. Next, they examined the strategies for the 3 highest priority goals. It can be tougher to prioritize strategies since, for many goals, all strategies need to be completed in order for the goal to be completed. However, there tends to be some logical order in which to approach strategies. It is helpful for the team to map out what they should focus on first, etc. The facilitator starts the discussion by asking: *"What strategy for this goal will have the greatest impact on the goal achievement?"* It's possible that the greatest impact strategies need to be pursued after other strategies are completed. However, this question gets the discussion going. The SLT ended up organizing strategies in priority order. Because action plans have due dates, it's not necessary to repeat this exercise. The due dates define the order.
Review & Update Action Plans	This exercise is led by SLT members. It focuses on strategies in priority order. Even if the plans are fully built, this provides a chance for the SLT to review the full plan together, and for other SLT members to make suggestions on all areas of the plan. For each strategy, the owner presented the plans to achieve it. This may reveal missing plans or plans that were included that they realize are not very important. They made a few changes. They confirmed that the owners and due dates for each plan are the right ones. They discussed how each action plan will be measured. This resulted in updates to the action plans. It did not identify any additional KPIs to track.
Review & Update Tactics	The SLT was tempted in the previous exercise to drill down into the tactics. The facilitator advised taking the iterative approach

	outlined here where each layer of the plan is addressed, one at a time. This exercise was led by the owner of each action plan. They were reviewed in priority order. The facilitator was impressed by how well the action plans were thought out. For some action plans, some of the tactics were well-developed and others were not. This exercise resulted in a good bit of discussion. When you get to the tactics level, it's easy to overlook some tactics. This ended up being be a healthy discussion where other SLT members contributed to other areas of the plan. This exercise resulted in tactics being built out with an owner and due date. Once the SLT was comfortable with the plan, the facilitator asked about their confidence that this plan will transform the business. The facilitator expected that they would say yes. But it's also one last chance to get full buy-in before moving forward with it.
Create Communication Plan	The facilitator led the discussion to create the Communications Plan for ContractCo. The objective is to inform the rest of the team, give them confidence there is a plan and give them enough information, so they are able to orient their work or make recommendations in support of the vision and plan. They discussed the various options and land on the following decision: ● They will hold an all-staff meeting with a social to announce the vision and plan. ● They will provide a once monthly all staff meeting to readout on the plan. ● They will rework the quarterly profit-sharing program to include achievement of KPIs as part of determining payout. More details to come. ● The KDM said he'll own the plan. ● They are a transparent organization and will be open about the plan. ● They will explain the KPIs and the new scoreboard they are putting in place. ● They want to ask questions of the group. Their technicians usually provide tactical suggestions, not big picture improvements. But if they hear a good idea from someone, they are open to it. They will encourage it. The KDM said he will use the Communications Plan Template to write out these elements of the plan.

Develop 90-day Sprints	The facilitator complimented the SLT on the good vision, strategy and planning work done in these workshops. She also highlighted that some concrete action has already been taken, based on the commitments made and issues resolved as part of this process. Now, the focus needs to move from planning to execution. The facilitator explained the importance of 90-day sprints. She explained that the SLT should establish the priorities for the next 90 days and decide what they want to accomplish in 90 days. The facilitator filtered the Strategic Plan in the Blueprint to just list those things with due dates in the next 90 days. She said that some teams focus on quantity over quality. Too many sprints likely will not get done and the last thing the team wants to do is miss the first set of sprints. She advised that they focus on a small number of tactics that will make a difference. They should not be easy to accomplish but should be achievable. They realized in looking at all the tactics that too many were set to be completed in 90 days. They adjusted dates on about half of the tactics, to arrive at 7 sprints. They realized that Katrina was assigned 5 of them and William none. William took ownership of two sprints to balance the workload. The facilitator then asked: *If you accomplish these 9 sprints over the next 90 days well, will you have made significant progress toward your plan? Is there any key thing missing from the list that should be included?* The facilitator also knew from experience that the main reason companies do not achieve their sprints is because they take on brand new tasks that take the place of some of the sprints. Sometimes this is ok but usually it is indicative of organizations that pursue urgent tasks over important ones. She explained this to the group and implored them to focus any extra time – any time not focused on the whirlwind – to those 7 sprints. She explained that it is ok for a disciplined organization to decide to replace one or more sprints with other sprints if there is a really good reason. However, for the first sprint period, she suggested that they make every effort to accomplish those 7 sprints.

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	She then went around the room and got everyone to say they were committed to completing these 7 sprints in the next 90 days. They selected Katrina as the person to keep things organized and focused on the sprints.
Greatest Takeaway	Since this was the last workshops, the takeaways felt more like reminiscing. The SLT spoke about how valuable they found these workshops to be. There were also comments on having it feel like it is the right time and they are at the right level to focus on execution.
Homework	The facilitator reviewed the issues, commitments and parking lot items coming out of the workshop. This is the last workshop so there is no new homework. However, the plan is not completely built out. Katrina asked everyone to build out their plans and she would set a meeting to confirm it is fully built out. They decided to fully build out the plan for just the 3 highest priority goals. The facilitator explained the transition to the Execution & Accountability (E&A) Meetings. She covered that, as the name suggests, they are focused on being a high-performance organization, where things are executed well and there is a culture of accountability. The first meeting is scheduled in one week. The facilitator asked the team to review their commitments and issues in advance as well as their sprints; and to add any new commitments or issues to the tracker. She also encouraged them to start taking action against the agreed to sprints. This is a link to the Blueprint report for the full case study.