

STRATEGY IN MOTION™

**A Proven Playbook
for Companies Who Win**

DARCY BIEN



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www.Holon.co

ISBN#: 978-1-955342-62-9 (Hardback)

ISBN#: 978-1-955342-63-6 (Paperback)

ISBN#: 978-1-955342-64-3 (eBook)

Published by:

Holon Publishing & Collective Press

A Storytelling Company

www.Holon.co

"I was introduced to Darcy's strategic planning process in 2003. Darcy's facilitation of that first strategic planning session put our company, Stober Drives Inc., on a sustained path of continuous improvement and growth. Most of our major improvement initiatives over the years have come directly through strategic planning, which we repeat every 18-24 months. I attribute our company's positive development and my personal professional development to a great degree to our engagement with Darcy and strategic planning. This book is a go-to guide for CEOs who are ready and willing to do the work."

—Peter Feil, General Manager at Stober Drives, Inc.

"Darcy's process brought a high level of structure and accountability to our company's strategic planning experience. She was upfront about how demanding the process could be at times – what she calls the "messy middle." Darcy is a straight shooter with genuine integrity. We had candid conversations and she told us what we needed to hear.

These discussions, along with her Strategy in Motion™ toolkit, helped us reach the finish line."

—Andy Schuster, President at Matandy Steel

"Darcy has been my much-needed strategic Sherpa! With her help and training, my team and I learned that intentional time on strategy is essential to having an evergreen, successful organization. Darcy not only engages and inspires leaders at a visionary level, she also provides a host of pragmatic strategies that are easy to implement and applicable to organizations of all sizes and types. Leaders committed to their own development around strategy and the success of their organizations cannot skip this essential book about putting your strategy in motion."

—Ken Elrich, Co-Founder at Solid Blend Technologies, Inc.

"While developing strategy is essential, so is implementing and expanding it. By golly, Darcy asks tough questions to make sure the strategy is right! The methods Darcy employs have empowered us to achieve excellence. Plus Group has thrived by applying Darcy's strategic principles and translating priorities to actions and results. Darcy provided invaluable input to our processes and has challenged us to not just grow, but to expand by focusing on our purpose and core values as the foundation of all that we do. Darcy's leadership fosters accountability with rigor, intensity and depth."

—Grant Mitchell, CEO at Plus Group

"It's a privilege to be in the room while Darcy leads companies through her process. Her ability to implement her Strategy in Motion™ toolkit – while simultaneously helping teams navigate the strategic planning landscape – is like watching a master at their trade. This book provides open access to the exact process Darcy uses to create brilliant strategic plans. She didn't omit any "secret ingredient" as she expertly shares every detail to help strategic leaders stretch to the next level of success.

This book will be a tattered guide that never leaves your desk."

—Cyndi Wineinger, Co-Founder & Partner at Stretch Strategic Leaders

"The four years I partnered with Darcy for strategic planning were the most intense intellectual years of my life. Together we facilitated strategic planning programs for more than fifty companies. It was a real joy to work with Darcy and to make substantive differences in our clients' success. Darcy has talked about writing a book for a long time, and I am proud that she has published it. She has always been passionate about making these strategy tools accessible to everyone.

I am confident that if you listen to her and trust her system, your company will be on a path to greater success."

—Laura Brunner, President & CEO at

The Port of Greater Cincinnati Development Authority

"Darcy's process is extensive, but complete. Her unique "listen and learn" approach involves all stakeholders and she helped chart a stronger course for our company. She focuses on execution – unlike many strategic plans that sit on a shelf. Darcy's Strategy in Motion™ process helps you scale, not just grow, and I think that's why organizations are successful with her approach."

—Dennis Andersh, CEO & President at Parallax Advance Research

"We have worked with Darcy since 2011. Her process challenged the way we think and the way we view our business and the markets in which we operate. In the first session we had with her in 2011, she unearthed the single largest strategic issue facing our company.

This led to a major, multi-year shift in our go-to-market strategy which has paid significant dividends in the form of both revenue and profit growth. Darcy's new *Strategy in Motion™* playbook is a fantastic amalgamation of all of the tools, approaches, processes, etc. that she has used to guide us over the last 11 years. She shares relevant examples that help readers bridge the gap between principle and practical application. This book will be valuable to both companies new to strategy and those who have been working the process for years. I look forward to having this book as a reference for our strategy team as we look to continue to scale."

—Dan Puthoff, CFO at JBM Packaging

"Darcy's Strategy in Motion™ process helped us grow our company, our leaders, and ourselves. She is a great listener and has a knack for sniffing out differentiators our executive leadership team had missed.

Darcy's process helped refine our cultural cornerstones – including our purpose, mission, and core values. Her "Listen and Learn" phase with all stakeholders allowed us to create a strategy to move the company forward. Through her stellar guidance, we have capitalized on our strengths and combatted our weaknesses."

—Molly North, CEO at Al. Neyer

"Darcy helped our young and growing craft brewery become more surgical about who we were going to be and how we would get there.

And, more importantly, who and what we were not going to be. She masterfully elevated our day-to-day mindset and guided us to a higher altitude of thinking through a time-tested strategy process. Her process enabled us to prioritize our SWOT, establish core truths about our business, define core values, and develop strategies to hold us accountable. She's done a tremendous job helping us focus to pave the path for growth and expansion."

—Brady Duncan, Co-Founder at Madtree Brewing Company

"When it comes to strategic planning, Darcy Bien's expertise and advice cannot be matched. She's guided hundreds of companies to embrace and achieve their vision of success. It all begins with a commitment to the Strategy in Motion™ process. This book gives you all the tools you need to prepare for business and personal success. On a personal note, as a professional facilitator working with nonprofit organizations, my clients have found Darcy's tools to be not only helpful but necessary when engaging in strategic planning."

—Kathy DeLaura, Managing Director & Owner at Partners in Change

"I feel blessed to have been able to work with Darcy on our family's long-term strategic plan. Our leadership team has enjoyed her thoughtful approach and passion for metrics. With Darcy's help, we worked as a team to define and articulate our Purpose, Values, and Vision. Our results have grown exponentially since engaging Darcy.

I recommend this book to anyone who is looking for a go-to playbook for long-term company success!"

—Britney Ruby Miller, CEO at Jeff Ruby Culinary Entertainment

There are many people to thank for getting this book published! My Dad is “why” I wrote the book. My mom is the unsung hero in my life. Family and friends graciously listened, pushed, and stretched me through each phase of development — a seven-year process. Thank you to my team and my clients who share my passion for strategy. It is a tremendous gift to work alongside you each day.

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In Memory of My Father

“Have you published anything yet?”

—Ken Misiak, my Dad

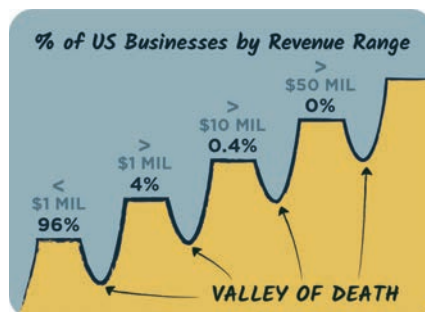
Why I Love Strategy

My Dad, who passed away from cancer in 2013, was an entrepreneur and a visionary. He spent countless hours thinking about and creating new ways to solve the problems that beset a range of industries. I enjoyed hearing the latest “idea” that he wanted to run with — and he had many! He was most excited when diving into the next new business; he loved working for himself, and he would joke, “I’ve been successfully unemployed for years.”

If you run a business, you know ideas are never in short supply, whether it’s a new invention, a unique service, or an idea for growing and thriving. The real challenge is taking those ideas and implementing them effectively. This is where many people, like my Dad, struggled; he was a big-picture guy, great at visioning, which allowed him to secure seed money easily, but he never broke through the \$1 million mark for any of his businesses.

He was in good company: 96% of businesses are smaller than \$1 million,¹ and less than half of start-ups survive beyond five years. This was my Dad! When action plans and additional resources were needed, things went downhill, and all his great ideas couldn’t help him. Implementation and follow-through were not his sweet spot.

Generating ideas requires a particular way of thinking; building im-



1 Harnish, Verne. *Scaling Up*. Gazelles Inc., 2014.

plementation plans and acting on them requires a distinct mindset. It takes planning, a systematic process, investment in the leadership team, and cash to work through the growth phase: this is why strategic planning is critical.

His Favorite Question

Thinking back, I don't know if my career was a reaction to how he approached his business endeavors — maybe. With a Mechanical Engineering degree from Georgia Tech and five years at Procter & Gamble, I thought an MBA from Harvard Business School was the icing on the cake. Along the way, I was able to take my first steps into building strategy, and, more importantly, executing on it. Shortly after my MBA, I joined a strategy-focused consulting firm and committed to helping businesses find the path to growth through effective strategy.

I'd always enjoyed writing and wanted to author a book; I just needed to find a subject that I was passionate about to which I could add value. A master of the "strategic pause," my Dad would wait until he had full attention for his next thought. Every time I spoke with him about my career goals, he would ignore what I was saying, do his famous strategic pause for effect, and then ask, "Have you published anything yet?" He believed publishing books was the ticket to real stardom. When I proudly shared my new accomplishments... I knew it was coming... "Have you published anything yet?"

Well, no, Dad, not yet. Until now.

If my Dad had spent more time planning for the future and less time talking about it — or had hired a Sherpa to guide him through each step — I would have a nice trust fund! Today, I am that Sherpa, supporting leaders and their companies through planning their futures and achieving growth. And this book? I wrote it for my Dad, who didn't have a Sherpa but would have been significantly more successful with one!



My Dad,
Ken, with Lily



The Final Farewell

Dad's last visit was for my daughter's first dance recital. Lily told him, "My teacher said we must do our best, smile, and have fun."

She loved to dance, always with a huge smile. During the recital, though, we noticed that she sometimes made the moves only on her right side. No one cared; we loved every minute, although we were curious.

Driving home, we asked her, "Honey, why did you only do one side of the dance?" Without a pause, she replied, "My teacher said the other side was 'optional'." We laughed all the way home.

Lily's teacher knew it didn't matter what these girls did, as long as they did something! Strategic planning is similar; it doesn't matter what you do, as long as you at least do something and decide to plan for the future. It doesn't have to be all or nothing — you get to decide what parts are "optional."

Dad, I did my best, and with this book in my hands, I'm smiling and having fun.



Preface

“We cannot solve our problems with the same thinking we used when we created them.”

—Albert Einstein

Strategy — Why Don’t We?

Imagine we’re sitting in your office or eyeballing each other on Zoom. I ask you, “How much time are you and your leadership spending on strategy?” Most leaders answer in subdued tones because they know it’s not enough:

<i>When I hear...</i>	»	<i>I call this the...</i>
<i>We’ve been successful so far.</i>	»	“Crossed fingers” strategy
<i>It’s too complicated.</i>	»	“I know what I know” strategy
<i>I don’t know where to start.</i>	»	“I’m ok for now” strategy
<i>I just need to hire...</i>	»	“Downward spiral” strategy
<i>We don’t have time for strategy.</i>	»	“I’m too busy fire-fighting” strategy

My personal favorite →

Despite everything written about work/life balance, leaders spend most of their time *in* the business, putting out fires, handling “issues,” and trying to get the results they want from employees.

On average, **companies spend <5% of their time on strategy.** This is an extraordinarily small amount of time to develop a long-term vision for their company, understand external trends and challenges, or figure out what they want to accomplish in the next three years. The benchmark we have seen with our clients is leaders of companies who are winning in their industries **invest 20% of their time on strategy.** This includes strategic assessments, reviews, communication, and direct work on goals and priorities.

How do you close the gap between the <5% and the 20%? You need

to create “strategic capacity,” AKA the time to plan, develop, and execute strategically. Here is the reality — leaders of the company own and are responsible for vision, three- to five-year goals, and creating the road-map for getting there. This is critical work, and most of the time, it means you need to enable others to take on *running* the business, so you can focus on *leading* it.

Busting the Myths

For every reason business owners give for not committing to team-based strategic planning, I have answers. For example:

We’ve been successful so far. — Past success does not guarantee future success.

Strategy is too complicated. — It doesn’t have to be.

I don’t know where to start. — There is help out there!

I need to hire that perfect person. — Structure follows strategy (not the other way around).

We don’t have time for strategy. — If not you, then who?

The reality is most of the companies I work with have been successful and have operated with an informal “strategy” — albeit reactive vs proactive. After all, they know (to some extent):

Who they serve *(AKA their market)*

What they offer *(AKA their products and services)*

Where they operate *(AKA their geographical scope)*

How they compete *(AKA their strategic focus:*

*differentiation, low cost/
cost leadership, or market niche)*

Myth #1: Small businesses *don’t* have (or need) a strategy. The reality is most successful small company Presidents do have a plan, although it may not be on paper. They would not have made it past a start-up without a plan. Entrepreneurs are normally amazing technicians in the business and have a plan, although they may be the only one who knows it, because it is in their head!

Their plans are based on current assumptions of how they believe things to be. This works, until things change, and their assumptions need to be challenged and potentially updated. Usually, these “informal” plans consist of using what they already know and doing more of the same each new year.

Myth #2: The way we have always done it will always work. This myth is based on the *hope* that if we continue doing the same thing, but harder, it will all turn out ok. The big question, “Is what you’re doing get-

ting the results you want?" If so, then keep doing it. If not, stop hoping. We need to remember how fast-paced our world is today and how technology is a game changer. Saying "this is the way we've always done it," can be the slow decline of a business. Don't be caught listening to music on a Walkman!

My clients have made it past the "cash crunch" and are experiencing a revenue plateau. Many grew by successfully serving a market niche, then they added customers, but they just can't break through to the next stage. Fundamentally, they're STUCK; they are running flat or on a decline, with no apparent external condition driving that change. All too often, they're economically dependent on two or three key customers.

They need to think differently, but instead, they try working harder and faster. It doesn't do the trick; they're still stuck. Unfortunately, some avoid the necessary investments (for example, marketing to generate targeted leads so they can say "no" to unprofitable accounts) until the pain becomes so great that they must change; change is painful, especially when forced rather than chosen.

Many leaders are so busy working *in* their business they don't take time to plan. It's a case of both unchallenged assumptions and misplaced priorities.

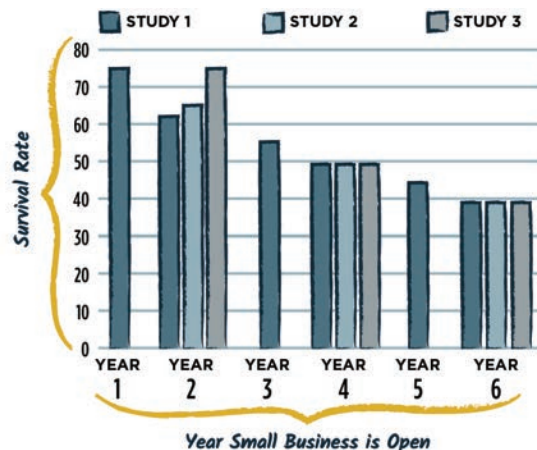


FIGURE P-1
SMALL BUSINESS SURVIVAL RATES

For new companies, survival rates are poor: only 50% make it to five years, less than 40% survive their sixth year — if you've made it past that point, congratulations!

Think back and notice the pattern of spurts of growth then getting stuck again each time — for subtly distinct reasons, but stuck, nonetheless.

The brutal truth is that companies stop growing because as desperation creeps in, they are:

- *Less attractive* to the market
- *Less desirable* to their best employees or incoming management who want to be associated with success
- *Less powerful* with key customers who have more bargaining power and forever want better pricing.

If they have investors, they start looking for a clear path to their exit.

Many of my clients have used a formal team-based strategic planning process to get un-stuck; ***you need to lead and manage more to grow successfully and reach the next level.*** This requires grit and new ways of thinking. Over and over (and over and over), I remind my clients that strategic processes and tools work — they are best practices and just need to be customized to work best for you.

If you want to be among the top performers, you need to start running your company differently and hiring the people who can help you achieve that growth. Strategic planning is the perfect place to start.

The Pain of Change

Since 2002, I have facilitated strategic planning for hundreds of organizations as a partner with my strategic planning firm, Partners in Change. In 2019, I co-founded Stretch Strategic Leaders to integrate leadership development and training. We started with the Cincinnati Regional Chamber of Commerce — running their *Strategic 8* public strategic planning program. Partnering with Aileron, an organization focused on bringing Professional Management to small businesses, I gained experience and wisdom facilitating strategic planning programs and sessions for their clients. With a track record of facilitating almost 400 plans, I came to understand planning was the easy part — it's the *implementation* that was the real work.

Leaders need a mindset shift to take on strategic planning — it begins with vulnerability and humility. I know you don't have all the answers, and guess what, no one expects you to! Planning is stimulating, needs a team, and takes commitment, rigor, and curiosity.

The real work starts in the execution, where the pain of implementation shows up fast. People generally don't like change; there is comfort in following the path well-trodden if what we are doing is working. We all know change is inevitable: you either proactively manage it, or you are forced into it. Think of competitors, suppliers, or customers who are not around anymore. Why? What happened? They ran out of cash, got stuck, or gave up and sold. It was too hard to change.

I Wrote This Book For...

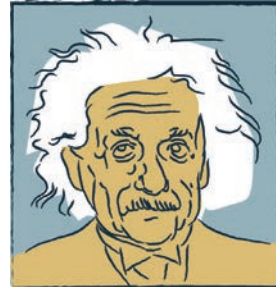
My goal for this book is for every company to realize the benefits of strategy and what happens if you don't take time to plan. Being around visionaries and passionate people is why I love working with small- to mid-sized growth-oriented businesses. These owners started with an idea and a sense of purpose — they may have needed help putting it down on paper, but they had a reason to go out on their own. Most are outstanding

technicians, but many are in the weeds of running their business and limiting their company's potential, which constrains their growth.

Strategic planning helps owners work *on* the business and not *in* it. It includes documenting what is in their heads using a team-based process to gain alignment and commitment to achieve a shared vision.

There are three things to remember:

1. Past success does NOT guarantee future success;
2. "If we want different results, we need to do different things;" and...
3. As Lily reminds us, everything is optional. Start where you can — do what you can do.



IMPORTANT!!!

→ As you dive in, remember to make the strategy process work for *you* — you'll see results year after year as you get better at it. It's worth your time and investment! I highly recommend outside support like a guide or trained facilitator, especially if you get stuck. The key is to keep moving forward.

In Each Chapter

I will take you through my **Strategy in Motion™ (SIM) Process** in sequence with each phase explained. There will be some background to the concepts that underlie the planning process, and then you can put those into action with your team.

I suggest you use this book as a work in process playbook. Feel free to highlight, circle, write in the margins, and put it to use! Most of all, enjoy learning and have fun! Read the entire book first, take lots of notes, then share it with your team, and, when you're ready, develop your own strategic plan.

I will share all the tools you need, which you can download by following the QR code seen here. Make them work for you, and remember, you've got this!



www.stretch-sl.com/SIMtools

Dave

NOTES



CHAPTER 1

The Why

“Running a company without a strategy is reckless.”

—A.G. Lafley and Roger Martin¹

Hope is Not a Strategy...

One day, a message popped up on my computer screen with some warning about my printer's ink pads. I hit “ignore” and hoped it would keep working. For three more months, every time I saw the message, I hit “ignore” again and kept hoping, and like magic, the printer kept working. I do strategy for a living, so I knew this would come back to bite me. Unfortunately, every time I went to pick another printer, I was overwhelmed; with so many different models and options to choose from, I'd freeze.

One morning, as I was preparing for a kick-off meeting with a new client, the inevitable happened. The magic failed — the printer broke, and I was in a panic at full throttle. I needed copies — quickly. After two hours of trying to navigate online print services (which is about as intuitive as a Chinese puzzle box), I hightailed it to an office supply store and grabbed a printer (which my husband later told me had horrible reviews), then rushed home to complete my preparation.

As I completed the session with my client, I thought about my printer, and a Japanese proverb came to me:

*When you're dying of thirst,
it's too late to think about digging a well.*

I was dying of thirst, all right. My pain level was HIGH, and I was consumed with putting out the fire. I noticed how comfortable I got ignoring the pop-up warnings and hoping it would never happen. I was burying my head in the sand about my printer's impending demise.

1 Lafley, A.G., and Roger Martin. *Plan to Win: How Strategy Really Works*. Harvard Business Review Press, 2013.

Until pain from putting up with the status quo is greater than the pain of change — we don't act. For a while, "hoping it will keep working" *can* hold things together, but eventually, something will break. We've all been there. Hope is not a strategy.

As a consultant who helps clients with strategic planning, I know firsthand how hard it is to change. It's as though we must be pushed into it; **statistics show proactive change happens less than 10% of the time.** We are creatures of habit, and our brains like to follow familiar pathways — after all, it makes life easier.

Hey! I'm Talking to You

Over a couple of decades, I have facilitated hundreds of strategic plans with clients in different industries and sizes. My goal is to first help business leaders know why they should "take time for strategy" and how to get started.

Two questions for you:

1. Why would you proactively choose to embrace change?

ANSWER: Strategic planning *manages* change by, first, understanding "why" we need to change and, second, to avoid the pain of firefighting. We do this by understanding what assumptions we are using to run our business. Those may have changed and, therefore, we need to change the way we think. When pain is avoided, fewer resources are wasted, decisions are made calmly (not from panic), and the company can be on the same page as to what the strategy is and what the plan is for executing it.

2. Is the timing right for you to begin strategic planning?

ANSWER: It depends. A few things to consider: Is your business day full of fighting tactical fires? Is your team getting the results you want? Is most of the future of the company in your head?

If yes, then strategic planning would be helpful!

What is Strategic Planning?

Strategic planning has been around forever but the concept was formally defined by the military. The word strategy comes from the Greek *στρατηγία* (stratēgia) — *the art of generalship*.

Wikipedia defines strategy² as a "plan to achieve one or more long-term or overall goals under conditions of uncertainty."

There's nothing more uncertain than being at war — wouldn't it be helpful to know *how* to win battles when you are in a strong position *and* a weak position? A sixth-century Chinese military strategy book, *The Art of War*,³ written by a general, political adviser, and philosopher, tells you how.

2 "Strategy." *Wikipedia*, Wikimedia Foundation, 15 June 2022, <https://en.wikipedia.org/wiki/Strategy>

3 Tzu, Sun. *The Art of War*. Filiquarian Publishing, 2007.

So, what does having a plan to win mean in the context of business?⁴ Just as in war, we need to win in business, strengthening our position to overcome the competition. How you do that comes from understanding your strengths and weaknesses, those of your competitors, and planning accordingly. Beyond beating the competition and winning new customers, you determine which battles to take on and which to walk away from. In strategy, we want as many wins as we can get with as few wasted resources as possible. Remember, most of my clients are “resource constrained,” so managing and allocating the resources is a critical responsibility of leadership. This is as much about saying “no” as it is about saying “yes.”

How to Win

Lynda Applegate⁵ compares strategy to soccer, using the phrase “look up.” Great soccer players don’t look at the ball when dribbling; they look up and out — constantly scanning the field, looking at the defense (the competition), and using their team’s strategy to win the game.

Strategic planning is very similar; you’re creating space and time for your business to look up from internal concerns, looking out at what is happening in the market, and then **creating a plan to win**. You’ll make time to be curious about your market, your competition, the economy, changing technologies, and disruptive ideas.

The Purpose of the Strategic Planning Process

My clients run businesses ranging from \$10-\$200 million in revenue, with 20-500 employees.

When I survey them about their key challenges as leaders, their biggest concern (as seen on Figure 1-1 on page 14) is understanding the critical *external* changes that will impact them, including future economic conditions.

If you are a typical small business owner and spend less than 5% of your time on strategy, it is tough to find time for that research. Your team also has knowledge and ideas, although when are they able to share? As a result, it’s difficult for the company to proactively prepare for new trends or challenges.

4 Listen to David Kryscynski’s video “What is Strategy?” on how to win with strategy: <https://www.youtube.com/watch?v=TD7WSLeQtVw>

5 Lynda M. Applegate, Baker Foundation Professor at Harvard Business School, also serves as the Chair of the Advisory Committee for Harvard University’s Master of Liberal Arts in Extension Studies degrees in finance and management. Lynda also plays a leading role in developing and delivering HBS Executive Education Programs for entrepreneurs and business owners.

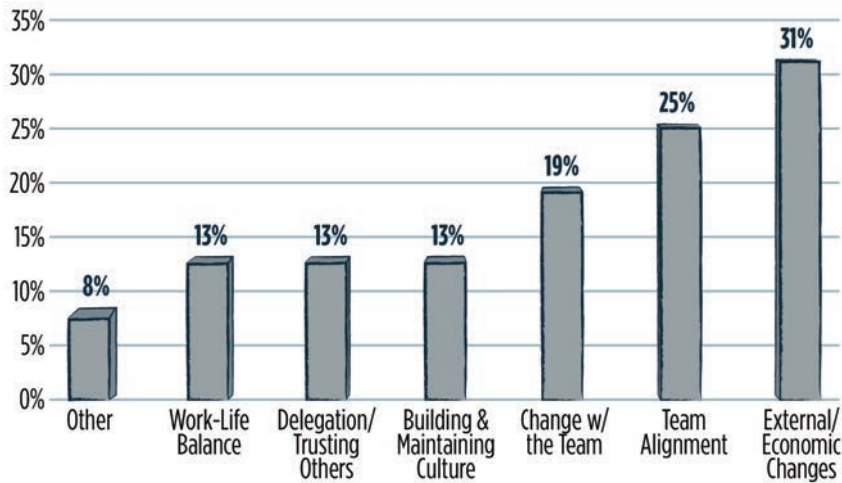


FIGURE 1-1
KEY CHALLENGES FOR BUSINESS LEADERS

Incidentally, team alignment is the second most critical challenge for businesses.

For some of my clients, strategic planning is the first time they have looked “up” and “outside” of their company as a team, had open conversations about it, and created a longer-term plan to act on new opportunities and threats.

The good news is — strategic planning done the right way tackles many challenges companies are experiencing. If your team is made a part of strategic planning, they will feel empowered and take more ownership in keeping the company successful for the long-term.

Strategy Helps You with Team Alignment

A strategy provides focus and helps you choose when to say “yes” and when to say “no” to specific initiatives or actions; a good plan helps you allocate resources to where you should invest in order to win. It also helps you walk away when the investment is not worth the potential return. Having a well-communicated, unified view will result in your employees supporting your choices and understanding why it’s a “yes” or a “no.”

Figure 1-2 on page 15 shows how when asked about the perceived benefits of strategy, allowing the company to say “no” is the top benefit. Why would that be the case?

Saying “no” doesn’t come naturally. Still, when used judiciously, it separates “yes” leaders who may have grown revenue — at the cost of lower profits — from those who said “no” to the poor opportunities, had more managed growth, and, most importantly, generated *better profitability*.

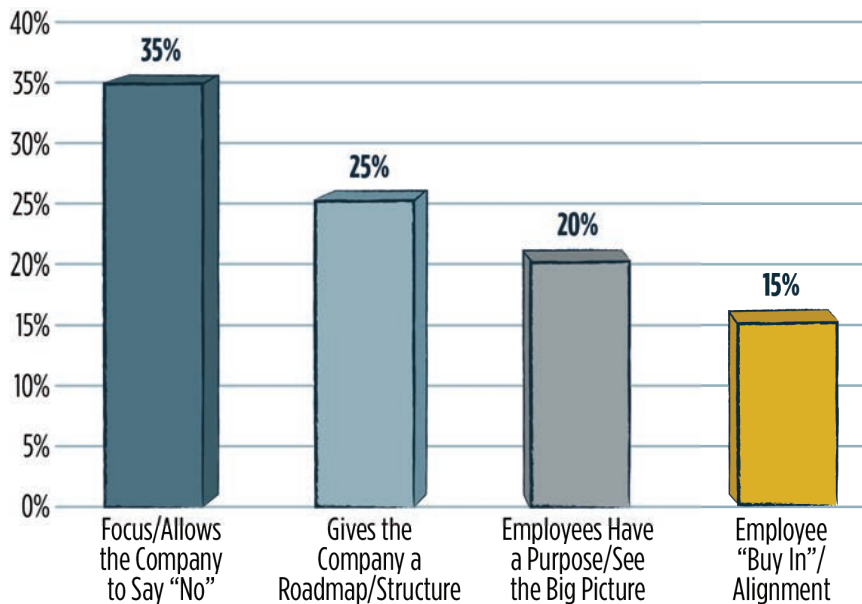


FIGURE 1-2
THE BENEFITS OF STRATEGY

One of my clients had 1,500 customers, yet less than 10% of them contributed 80% of the profit. They had a strategic priority called "Starve the Problems" for two years. They developed an aggressive pricing strategy to discourage unprofitable clients (effectively saying "no") while keeping their profitable clients (saying "yes").

The net result was an increased profit for less work!

So, the bottom line (literally) is saying "no" to unprofitable clients to increase profits — put that in your back pocket for future use.

Strategy and Alignment

I love the way Molly, a long-term client, the President of a design-build company, described the benefits of strategic planning:

"First, having a well-articulated strategy helps all employees have purpose in their work. If carried out properly, employee and company goals align to achieve the strategy. Prior to our company having a well-defined strategy, we had people moving in different directions pursuing opportunities that they, individually, thought were valuable, but could not get support from other functions of the organization. A well-defined and communicated strategy now ensures our people are working on a common plan."

How Do You Know You're Ready?

As we discussed, many businesses plateau at specific revenue markers for their industry — to get off the plateau requires a growth-focused business model: being profitable (so you can invest in opportunities) and having an aligned organizational structure (so rather than wearing multiple hats, leaders are experts in their area).

Laura Brunner⁶ created the Evolution of Strategic Planning model, which describes the stages companies go through as they build their strategic capacity. To move through the stages takes commitment and investment. I work with many companies going from Stage 2 to Stage 3, which includes external based research.



FIGURE 1-3
THE EVOLUTION OF STRATEGIC PLANNING

Stage 1: Meet the Budget. Most of our time is spent looking at revenue and profit in the rearview mirror and short-term planning, usually annually. When a business starts adding metrics, specifically leading indicators (pipeline, lead-time, customer, and employee satisfaction) and investment in the operation is needed to grow, they're ready for Stage 2.

Stage 2: Predict the Future. During Stage 2, a company starts to think three to five years ahead instead of just planning for the upcoming

⁶ Laura Brunner was a Founder Partner of Partners in Change, one of my companies. Now, Laura Brunner is the President and CEO of the Port of Greater Cincinnati. Thank you, Laura, for the mentoring and support!

year. Leadership starts looking for the gaps in infrastructure, especially human talent, which need filling if growth is to be a possibility.

In a Stage 2 business, some critical responsibilities *are still* a part of someone's job. For successful growth, it's essential to hire people who have the competencies and knowledge — for example, someone in Marketing or HR. These are roles that require subject-matter expertise. As an alternative to hiring, a cost-effective way to acquire these capabilities is through outsourced support, like specialty firms, consultants, or fractional C-level people. A key outcome of a strategic planning process is identifying and prioritizing the staffing needs to scale the business for growth.

Stage 3: Think Strategically. Over 30 years ago, when I worked for Procter & Gamble, I found this quote: “Leadership is the art of getting someone to do something you want done — because they want to do it.”⁷ I think that is also a quote from BBC's *The Office*!

I think about this a lot with strategic planning. Most times, when thinking three years into the future, we know this will require “change” and we can see that what we are doing right now just isn't working. Remember, if you want different results, you have to do different things. Involving key leaders in the strategy is critical to help them know why change is needed.

It's time to switch from playing Chutes and Ladders to chess. Stage 3 companies have a sustainable model, have done some planning, and are ready to take it to the next level. The company leaps from internal considerations to a need for *external* knowledge and understanding. Thinking strategically means looking for market opportunities and threats; it's time to examine competitors, industry research, and customer feedback to make informed decisions about the right chess moves. Because the leadership team has grown from just a few to six or eight key people, it is also critical to align around a longer-term growth plan.

Stage 4: Create the Future. Strategy is now integral to the company's operations; it has grown from the leadership team to energizing and engaging the entire organization. **Having supported the process so many times, it's my favorite moment to watch — when leadership teams wake up and become “Alive at Work.”**⁸ This book cites studies that indicate we are more engaged and happier at work when we are given time to be creative and involved in planning. And of course, it's fun to dream and even better to achieve results. Maybe it's time to start that dream journal.

Companies in Stage 4 have a solid strategic framework and wide-

⁷ O-Toole, James. *Leadership A to Z: A Guide for the Appropriately Ambitious*. Jossey-Bass, Inc, 1999.

⁸ Cable, Daniel M. *Alive at Work: The Neuroscience of Helping Your People Love What They Do*. Harvard Business Review Press, 2019.

spread strategic thinking; they are fully committed to a strategic planning process, they utilize proven tools, and most importantly, they have a capable strategic planning team driving the process forward.

Time to Stop Being Reckless

I can't
stress
this
enough!

The leader's primary responsibility is to proactively prepare for the company's future. Here's the reality: **it's your job as a leader to define the future. If you don't, who will?** We can all agree that change will happen, and we can either manage it preemptively or wait until we are forced to mutate. It's not so very different from your fifth-grade science class on genes. Mutation will happen in the market, whether you like it or not. Your job is to proactively manage the change and choose a direction.

You'll need a learning mindset and team mindset because the first time you work on real strategy, it may be challenging; I promise that it will get better with practice. As a first-time planner, think of strategic planning as an opportunity to *listen and learn*, *document* what's in your head, and *share* it with others. Then *implement*, *keep learning*, and *continuously improve*.

Why Don't People Want to Change?

Many years ago, I asked my organizational development partner, Cyndi Wineinger,⁹ "Why don't people change and adapt to new ideas?"

Her answer was simple: "They don't want to."

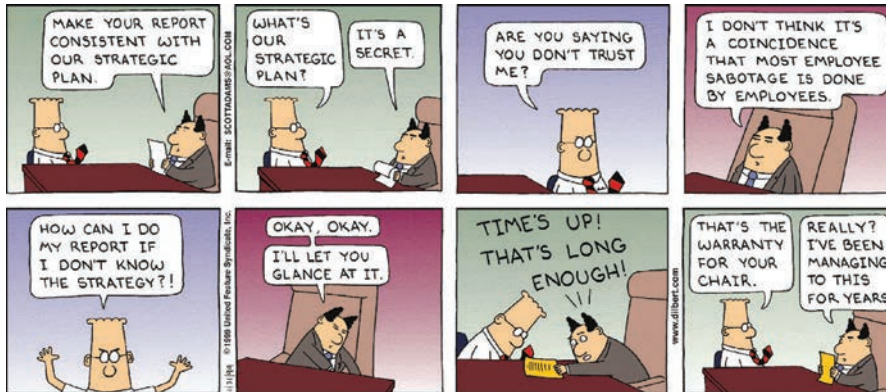
When she first said that I was ready to argue... *What about the plan? What about the new reality that will require them to change? What about the...?* But people change only when *they* want to. We're only human, after all. This is a massive opportunity for small companies — you need to figure out *why* your people would wish to change. **Engaging them in strategy is a huge part of a successful change process.**

Involving people beyond top leadership when developing your strategy allows them to contribute ideas to those goals and provide reasoning to support them. When they participate in the process, they need to be involved, understand their role in making things happen, and own the outcome. Employees want to be involved, heard, and trusted. As we know, many plans sit on the shelf because someone not involved in the process had it handed to them but wasn't motivated to act on it. It may be a great plan, but without buy-in, that's all it will be — a great piece of work, gathering dust, with no impetus to make it happen.

⁹ I've known Cyndi since 2018. She's an expert on all things "people" related and she knows how to effect change. **She has spent years studying the effects of change on the brain.**

If companies tell me they have a strategy, I ask to see it, at which point they get uncomfortable. The plan may be a PowerPoint presentation for the board or a past plan that may or may not be relevant. Unfortunately, many times, the plan is in the owner's head, and they tend to tell employees about it *only* on a need-to-know basis. I reference this *Dilbert* a lot. If it's not *visible* and *communicated*, it might as well be "the warranty for your chair."¹⁰

One of
my go-to
Dilbert
cartoons!



The most significant (and tricky) part of becoming a strategic leader is motivating your people to embrace change with understanding and enthusiasm. This is one of the most rewarding tasks ahead of you.

Strategy in Motion™ — IDMTSU

Across my career, I developed a strategic planning process by curating best practices from all the "strategic gurus:" Michael Porter, Jim Collins, Robert S. Kaplan, and many of my clients. I have a phrase I use a lot with my clients, "I did not make this shi*t up (IDMTSU)..." meaning these tools have been proven to work. I use 80% of the same process with my clients and customize about 20% of the process to meet each of their needs — this is critical. In the remaining chapters, I will walk you through how to use the process for yourself and your company.

Today, **Strategy in Motion™** is a well-proven process for growing small to mid-size companies. As part of the process, several tools are available to help you gather data and guide you toward your strategic plan.

The Four Phases to Strategy

My **Strategy in Motion™ Process** has four phases, or steps.

10 DILBERT © 1999 Scott Adams, Inc. Used By permission of ANDREWS MC-MEEL SYNDICATION. All rights reserved.

Phase 1: Listen and Learn.

You start the process by assessing what you already have available and determining what further research is needed. Many call this an **environmental scan**.

This includes an internal analysis with customer and employee surveys and an external analysis, including industry, market, and competitor research.

For first phase planners, I encourage my

clients to take an active role in the research to really understand the current reality — more on this later. The goal is active listening and learning. This means rolling up your sleeves and doing some of the research. This changes as companies grow and get larger. **My goal is for my clients to first do it themselves before they ask others to do it.** This is a good rule of leadership, by the way!

Phase 2: Plan Development. This includes your core purpose, core values, vision, and critical strategic choices requiring investment and focus. This is an interactive process with working sessions, allowing different perspectives, and then coming together behind an aligned three-year strategic plan and one- to two-year strategic priorities.

Phase 3: Implementation. This is where the rubber meets the road with scorecards, action plans, and communication focused on the strategy. **Many companies get anxious when accountability increases, and some even freeze waiting for perfection, or worse, they “put it on the shelf” because they are afraid to move forward.** Our process and tools will help you over the speed bump. You will need to reduce the need to be perfect and focus on making progress.

Phase 4: Strategic Management. The company starts to link the strategy throughout the organization, allocate resources to support the plan, and continually assess the plan’s effect, making necessary improvements. Communicating the strategy becomes a critical responsibility of the leadership team. Cyndi Wineinger, the “people” expert, reminds our leaders, “The vision bucket is always half-empty,” which means constant cheerleading (yep, that is what it takes!).



You stick with your plan, you improve, and eventually, it's time to assess how it went and update. As you work the strategic process, you will add tools and build capacity. It is amazing to see how far a company has come in three years of commitment to the process. **Rinse and repeat, not one and done.**

*Strategic
planning
improves
with
practice!*

Chapter Summary

In this chapter you:

- Looked at the cost of ignoring the warning signs, hoping, and doing the same thing year after year. This approach only works for so long — eventually, something will break. Hope is NOT a strategy.
- Understood what strategic planning is and how it helps you win in business. Critically, you have to look up from the day-to-day to gather the information you need from outside your company to create an effective strategy.
- Examined the stages of how companies approach planning, including the incremental results you achieve when you put strategic planning in place as part of your management processes. You established which stage you're in and confirmed the role of leadership in providing the impetus for strategic planning.
- Acknowledged that planning is needed, but execution requires buy-in from your people — all your people. Implementation is the hardest part of the strategy, mainly because people resist change. It's your job to inspire them.
- Grasped the four phases of **Strategy in Motion™**, the foundational process you'll use to take your company on this strategic planning journey. Realized that **IDMTSU** (I did not make this sh*t up) and these really are proven best practices to help companies be more successful for the long-term.

And how's my printer? The best part is that the new one works better than my old one. I'll be proactive next time round, hopefully. 😊

NOTES



ABOUT THE AUTHOR

Darcy Bien



Darcy Bien is a strategist who has helped hundreds of companies achieve their vision. With more than 20 years of experience, her national reputation is built upon delivering actionable strategy. The daughter of a brilliant entrepreneur who struggled with execution may explain Darcy's bulldog tenacity for doing whatever it takes to achieve successful strategic implementation.

Her debut book, *Strategy in Motion: A Proven Playbook for Companies Who Win*, outlines the anatomy of strategic planning and the

best tools to drive results. Jam-packed with memorable anecdotes that show her ideas in practice, the book is a must-have guide for companies who are new to planning and for those who have plans collecting dust on the shelf.

Darcy was a partner of a strategy focused firm, Partners in Change, since 2001. Recently, she is co-founder of Stretch Strategic Leaders, a consultancy for strategic planning and leadership development. She holds an MBA from Harvard Business School and a BS in Mechanical Engineering from Georgia Institute of Technology.

Darcy resides in Cincinnati, Ohio, with her husband, their three ambitious children, and two dogs who love to run with her!



APPENDIX 1

The *Strategy In Motion*TM Process

Strategy in MotionTM is a four-phase process for developing and successfully executing a strategy for your company.

STRATEGY *IN MOTION*TM



1 LISTEN AND LEARN

- » Complete strategic assessment
- » Understand stakeholder goals
- » Listen to employees and customers
- » Analyze external environment

2 PLAN DEVELOPMENT

- » Agree on current reality
- » Define desired state
- » Determine strategic choices
- » Outline strategic priorities

3 IMPLEMENTATION

- » Create scorecards and plans
- » Update structure
- » Link to teams
- » Communicate to organization

4 STRATEGIC MANAGEMENT

- » "Look up" monthly
- » Assess quarterly
- » Update annually
- » Invest in training

Phases 1 and 2 cover the development of a strategic plan, and Phases 3 and 4 cover how to implement and create strategic management around the implementation. Each phase comes with tools illustrated and described in the relevant chapters. A list of tools is provided on page 190.

The tools listed below are downloadable from stretch-sl.com/SIMtools or by following the QR code in the Preface:

Phase 1: Listen and Learn

Strategic Planning Assessment Tool
Strategic Planning Team Tool
Stakeholder Goals Tool
Current Momentum Tool
Board/Advisor Survey Tool
Key Customer Interview Tool
Competitive Analysis Tool
7 Factor External Analysis Tool

Phase 2: Plan Development

SWOT: External/Internal Analysis Tool
Strategic Plan Summary: Current Reality Tool
Strategic Plan Summary: Desired State Tool
Business Segmentation Tool
Business Segmentation Forecast Tool
Strategic Priority Tool
Strategic Plan Summary: Strategic Choices Tool
Strategic Plan Key Concepts Tool

Phase 3: Implementation

Implementation Checklist Tool
Strategy Scorecard Tool
Run-the-Business Balanced Scorecard Tool
Priority Action Plan Tool
Team Meeting Calendar Tool
6 Core Strategic Questions Tool

Phase 4: Strategic Management

Internal Strategic Planner: Certification Checklist
Quarterly Priority Review Tool
Strategic Process Checklist Tool

APPENDIX 2

The Stretch Strategic Bootcamp Program

Nearly 400 companies have used Darcy Bien's ***Strategy in Motion™ Process*** to deliver 2.2 times the industry's standard implementation rate.

Learn from her 20+ years of experience in customizing strategic planning best practices for growth-oriented, mid-size companies.



Kickstart Your Strategic Planning with Our Flexible, Online Bootcamp Program!

Acquire the skills you need to strategically grow your business, team, or department in the new reality. With four self-paced modules, this Bootcamp will equip you with the necessary process and resources to create a winning strategy. Many key assumptions have changed, and it is critical to understand why, what, and how to move forward.

FOR EXECUTIVES, LEADERS, AND DEPARTMENT MANAGERS WHO WANT TO WIN AT STRATEGY.

WHAT YOU WILL LEARN:

- The framework and building blocks of creating a strategy to be successful
- The integral role of PEOPLE and STRATEGY needed to propel your business/team forward
- Key strategic concepts everyone in your organization should know
- Critical tools to customize for your organization

HOW YOU WILL BENEFIT:

- Acquire the skills you need to win at strategy
- Learn best practices, vignettes, and articles to expand your strategic knowledge
- Leave with a strategic toolkit of 25+ best practices customized for mid-size companies

CERTIFICATION (optional) Designed for Process Owners:

As part of your **Bootcamp**, receive the **Strategy in Motion™** Certification Guide and work through the tools and process at your pace. It also includes phone support and in-person (or virtual, if needed) certification.

The four steps to certification are:

1. Complete the Certification Checklist
2. Take the online Bootcamp
3. Develop your strategy
4. Complete your certification

FOR MORE INFORMATION:

- **513.807.6647 | info@stretch-sl.com | stretch-sl.com**
- More details and enrollment: **<https://stretch-bootcamp-training.teachable.com/p/stretch-strategic-bootcamp>**
 - Discount code: **STRETCH**

APPENDIX 3

Client Strategic Infographic Examples

The infographic is set against a background image of a mountain range at sunset or sunrise, with a forest in the foreground. The text is overlaid on this image in a clean, sans-serif font. The sections are separated by their respective headers in green. The Madtree logo is in the bottom right corner.

VISION
Build a sustainable purpose-driven company
our kids will be proud of.

PURPOSE
We connect people to nature and each other.

WHAT DIFFERENTIATES US
We create engaging experiences that foster conversation.
We celebrate and protect nature.
We cultivate craftsmanship.

BEHAVIORS
Connect. Grow. Give a Fuck.



MADTREE

MADTREE BREWING COMPANY



STOBER

WHO WE ARE



PURPOSE

Deliver peace of mind in the demanding world of motion



VISION

The gold standard for perfect motion



MISSION

STOBER puts things in motion...
...integrally and precisely
...as a team and with personality
...responsibly and in a forward-looking manner

WE ARE STOBER.

CONNECTED. COMMITTED. COMPASSIONATE.



THE BIG PICTURE

We think in terms of integrated solutions



TEAMWORK

We embrace teamwork



QUALITY

Quality is in our DNA



INNOVATION

Innovation is what drives us



DEDICATION

We give our all for mutual success



RESPONSIBILITY

Sustainable growth is our top priority

MISSION STATEMENT

STOBER DRIVES INC

PURPOSE

To transform the hospitality industry by improving lives through our culture of caring.

VISION

To elicit genuine JOY from each and every guest, community, and employee we serve.

MISSION

To celebrate life through impeccable experiences and impactful emotional connections.



SERVANT'S HEART
Icon: The Heart

The heart symbolizes caring, compassion, kindness and hospitality. The outward moving lines symbolize light in the darkness, helping others find their way.



CHANGE THE GAME
Icon: The Knight

The knight literally changes the game of chess. The knight is the only piece that can "jump over" other pieces, it moves in ways that other pieces can't in order to achieve its goals.



HUSTLE
Icon: The Flame

The flame represents the internal fire and irresistible force that drives us to outperform the competition and propels us to success, no matter what the odds are.



BE EXCEPTIONAL
Icon: The Star

An industry-wide symbol of excellence, and achievement, the star reminds us what we're here to do everyday - be the best, do what's right, and outshine everyone.



TRUE-TO-SELF
Icon: The Dove

The dove is a universal symbol of purity and truth, reinforcing our value of being true-to-self. The dove has the ability to rise above; it is a standard bearer for distinction and unwavering authenticity.

JEFF RUBY CULINARY ENTERTAINMENT

5-Year Desired State: 2022 to 2027

Vision: Advancing the Nation's innovation advantage

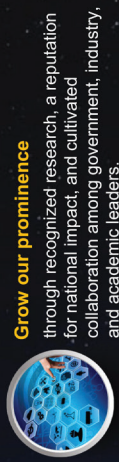
Purpose: Solving critical challenges for the Nation's security and prosperity

Mission: We deliver innovative research and provide technology, human, and business solutions via The Science of Intelligent Teaming™ for government, industry, and academic clients with critical challenges.

Strategic Goals:

- Establish Parallax as a nationally-recognized research institute
- Become the preeminent leader of innovative public-private partnerships
- Broaden and deepen our capabilities and expertise
- Grow our national footprint with new labs, regional offices, and partner collaboration spaces
- Attract and retain the best talent as an employer of choice

Strategic Priorities:



Grow our prominence

through recognized research, a reputation for national impact, and cultivated collaboration among government, industry, and academic leaders.



Grow our talent

as an employer of choice committed to growing current staff while strategically hiring and retaining additional talent.



Grow our collaborations

by creating the best virtual work environment for our staff and partners and formalizing nationwide collaborative agreements with universities and innovation hubs.



Grow our customer impact

by exceeding our customer expectations and achieving national recognition for impact.



Grow our business

by increasing revenue, diversifying our national security customer base, and expanding our geographic footprint.



Grow our innovation infrastructure

with world class computing, networks, labs, processes, and learning communities.

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Figures with “C” at the end are Client Examples.