

PATH TO TRUE NORTH

Strategy is the art and craft of making the best use of the resources you have to reach your goals. In the good old days, strategy was all about predicting and controlling the world around us.

Today – when turbulence and uncertainty is commonplace – good strategy is mainly about sensing and responding. Nevertheless, there are a few steps you can take together to sharpen your compass and to be prepared for the next strategic opportunity.

WHO SHOULD GET INVOLVED?

At least the leadership (management team and board members) should participate in this Path, but if possible, all members of the team be involved. In some cases, bringing in an outside perspective (“critical friends” or close partners) can be fruitful for stimulating critical appraisals and new viewpoints about strategy.



AT THE END OF THIS SESSION YOU WILL HAVE:

- A shared understanding of why you need a strategy and how you will use it.
- An overview of internal and external dynamics that can impact your strategy.
- A set of concrete actions to work towards your strategic intent.

PREPARATION

For this Path, you should have all your strategic documents on hand and an up to date [Vision Statement for Guidance \(20\)](#).

MATERIALS

- Colorful Markers (red, green, etc.)
- Flip Chart
- Moderation Cards
- Scotch Tape

TOOLS

Method Cards:

- Action Planning for Next Steps (02)
- Understanding Patterns of Decision-Making (08)
- Common Ground for Mutual Understanding (42)
- Vision Statement for Guidance (20)
- Problem Tree and Solution Tree for New Strategy (21)
- Theory of Change for Tracing the Path to Impact (23)
- Opportunity Driven Approach for Planning in Uncertainty (22)

Background Papers:


- Opportunity Driven Model (13)
- VUCA (14)
- Theory of Change (15)
- Procedure U (29)
- Weak Signals (02)
- Value List (30)

Worksheets:

- Activity Model (01)
- Action Plan (02)
- Value Matrix (23)
- Problem Tree (10)

FOLLOW UP

Break the strategic plan down into annual action plans (budgets/projects/staffing), and keep monitoring the identified “weak signals”.

To learn more about weak signals, check out [Weak Signals \(02\)](#) 

ORIENTATION 90MIN

HOST / PREPARATION GROUP: Introduce Path and day program.

First round and discussion:

Why do we need/want a strategy? How will we use the strategic plan? Share your ideas for potential objectives such as providing direction and clarity, setting action priorities, raising the organizational profile, or strengthening the potential for impactful action.

Get a first impression on how to plan in today's uncertain environment using [Opportunity Driven Approach for Planning in Uncertainty \(22\)](#) ■▨

INPUT TO PATH CANVAS: 3 goals or objectives for the strategy process: What do you want to gain from setting up a strategy?

GROUNDWORK 100MIN

Take some time to choose one of the following tools depending on your needs.

- 1 Do you feel like you have made many good plans, but have a hard time understanding why they never really come to life? Then choose [Understanding Patterns of Decision-Making \(08\)](#) ■▨ to explore how the decision-making culture of your organization might affect your future planning process.
- 2 Do you have the impression that many of your discussions on strategic decisions lead instead to more fundamental, value-based differences? Then choose [Common Ground for Mutual Understanding \(42\)](#) ■▨ to explore how the values of your organization should be incorporated into your future plans.

INPUT TO PATH CANVAS: 3 lessons learned regarding the strategy model: What did you learn about your organization that will help you to develop or refine your strategy?

SUMMIT 120-160MIN

Revisit your vision statement. Read it individually and discuss if it still applies.

Then continue and choose one of the following tools according to your needs.

- If you don't have a strategy yet or would like to create a new one from scratch, then complete [Problem Tree and Solution Tree for New Strategy \(21\)](#) ■▨
- If you already have a strategy that you would like to modify, explore potential adjustments with [Theory of Change for Tracing the Path to Impact \(23\)](#) ■▨

INPUT TO PATH CANVAS: A definition of "Path of Intervention (or Impact)": Which Path of Intervention (or Impact) did you choose?

OUTLOOK 60MIN

Now that you have the outline of your future plan, revisit [Opportunity Driven Approach for Planning in Uncertainty \(22\)](#) ■▨ and formulate your strategic intent.

INPUT TO PATH CANVAS: A definition of "strategic intent": What is a strategic intent and how can you formulate yours in 3 sentences?

ACTION PLAN 60MIN

- Work with [Activity Model \(01\)](#) ■▨ Position activities/programs on the model matrix. Discuss consequences. What needs to be strengthened? What needs to be stopped? Do the activities you are already doing support your strategic intent?
- Or discuss which capacities need to be developed to be able to act quickly on upcoming opportunities. See [Opportunity Driven Model \(13\)](#) ■▨
- Take action using [Action Planning for Next Steps \(02\)](#) ■▨

INPUT TO PATH CANVAS: 3 activities/programs to decrease/end, 3 to strengthen/start or 3 capacities to develop: What did you learn about your activities and capacities and how will you implement these lessons?

CLOSING 30MIN

Final round / Check Out