# Being Strategic

## The User Guide

If you're reading this, you're probably considering using the Being Strategic process with a group. Maybe it's your team at work, or the fund-raising committee at your kids' school—or maybe you're thinking of using it with some friends with whom you're considering starting a charitable group, or even a new business.

Whatever your situation, we're confident this process can really help. We—and many of our clients—have used it in all the ways above and many more. This user's guide is meant to be used in combination with the Being Strategic planning template you're also downloading and the *Being Strategic* book, to support your success in using this process to get to a successful outcome with a team or group of any kind.

In other words, the combination pack that you've received at your pledge level is designed to give you the support you need to be strategic with a group!

### Before You Get Started

- First, use the FIT screen to decide whether or not this is an appropriate situation for using the Being Strategic process.
- If so, think through how you can raise the group's awareness and motivation before the session to use this process. (There's additional information about how to do this in Chapter 11 of *Being Strategic*.) Having the group members read *Being Strategic* can be a powerful way to pique their interest.

  *NOTE: If you make your best efforts to get your group aware and motivated and they're still not interested in using this process—let it go! Trying to do this process with a group that doesn't want to do it is not a good idea: it really requires full and active participation in order to succeed.*

- Practice facilitation in a low-risk situation first. If you don't have much experience facilitating a group, try using the facilitation skills explained in Chapter 13 of *Being Strategic* to conduct a meeting at work, or to facilitate a conversation with another group (a book club, PTO group, church committee, etc.) It will give you a chance to get more comfortable with the skills before you have to put them to the test with this process.
- Make sure you're really clear about how to move people through the process: thoroughly read the second half of *Being Strategic*—especially Chapter 12. As you're reading, make notes to yourself about how you'll conduct each step.
- Finally, think about and decide on a draft version of your group's challenge. You may think you already have a good sense of it, but I'd suggest you do some digging anyway, to see what others think and to get more information.
- Here's how you might approach that. Go to other key members of your team and ask: "What core problem are we solving for here, or what core challenge are we trying to address? That is, what isn't working?" Then listen very carefully to what you hear: really be a fair witness. Don't focus on whether or not you agree, or—if you disagree—which of you is right. Simply take in everyone's point of view.
- Then, draft your group's "challenge question," using the 'How can we….?' frame, and bring it to your group's session

## During the Session

- Set yourself and the group up for success by doing three things at the beginning of the session:

  1) Remind people of what you'll be doing together. Even if they've read the book, and even if you've explained it clearly, this will be a very helpful "you are here" starting point. I'd suggest a flipchart with "Define the Challenge" and the four steps of the model written out, and then another flipchart with the "castle on the hill" image, as in the book—having both words and a picture to look at as you briefly explain each step will be very grounding and clarifying for people.

  2) Once you've gone through the agenda, ask for people's hopes and concerns about the session, and use those to create 'road rules.' Here's how that works: Set up a flipchart with a line drawn down the middle, a "+" at the top of the lefthand column and a "–" at the top of the right hand column. Say something like, "Before we start, I want to get a sense of everyone's expectations for this session: Given what you've heard about the process, what do you hope happens here?" Then just write what they say down in the left column, Then say, "Great—so, what DON'T you want to have happen? If you turned to someone at the end of the session and said, 'Boy that was awful because of "X"—what would that "X" be?" Then write down their answers in the right column.

     Once you have their two lists, you can use them to create "road rules" for the session. Say something like, "So, I'd suggest we crate some agreements about how we're going to work together over the next two days (or over the next few weeks or months, if you're doing the process in part-day sessions) to make sure we achieve the things in the left hand column, and not the thing on the right!" Then work with the group to make behavioral agreements about how they'll work together (there's a little more how to do this on pp 226-228 of *Being Strategic*).

  3) Explain the facilitator role and get their permission to play it. This may seem silly, since you're already up there, and (presumably) you've gotten their OK to facilitate the session. But I've found it very helpful over the years—by doing this, you're getting their express permission to Clarify, Protect and Keep on Track, and that way they're much less likely to get miffed or push back when you do those things.

- Give yourself room to learn. Let the group know you're new to this process, and that you'll be relying on them to help move through it successfully. Asking for their help and support will—generally—get them on your side from the very beginning. And making your "noviceness" public will give you the freedom to correct any mistakes or omissions you might make without embarrassment or attempted cover-ups!

- Work "out loud." We've found it extraordinarily valuable to flipchart the group's responses, and in *Being Strategic* I've outlined ways to do that in each of the steps of the model. It gives everyone a chance to stay in touch with the group's progress, and dramatically reduces confusion and repetition.

- Get a scribe if you need one. Some people find they like to scribe the group's responses themselves as they're facilitating: it helps them keep on track and connected with the group's thinking. On the other hand, some people - especially when they're just starting out—find it difficult and distracting to both facilitate and scribe. If you ask someone to scribe for you, make sure he or she is very clear on the process, and how you want him/her to capture the conversation. Also, make sure the person can write quickly and reasonably legibly, and that he/she understands that the task is to summarize the essence of a comment—vs. get every word…or he or she will fall way behind!

- Make sure there's a "keeper of the flame." this is someone who takes responsibility (out loud, in front of the group) for being the "buck stops here" person for the group's vision and strategy plan. Often, it's the team leader. Or maybe it's you. In any case, this person is the one who holds the group accountable for doing what they've said they'll do—particularly for keeping the "going-forward agreements" I talk about below.

- Get going-forward agreements. Make sure that you get the group to agree how they'll keep themselves on track post-session. I suggest you read Chapter 14 in *Being Strategic* for ideas about how to do both regular progress check-ins and a more in-depth "Repositioning."

## After It's Over

- "Here's what we said." Make sure that the key notes from the session (challenge question, SWOT, vision elements, obstacles, strategies, and tactics) get written up and distributed to everyone in the session.

- DO what you said. Keep the going-forward agreements you made above (this is why it really helps to have a KotF (keeper of the flame). Keeping these agreements is what takes this from being a one-time event, and helps it become a true map to the future.

- Remember that real life is moving object. The beauty of this process is that it gives you a way to stay current with your own reality relative to your challenge. So, when you and the group get together to reposition your vision and strategy, don't resist change: the "What Is" may have changed, you may have gotten clearer about the "Hope," you might have found that the biggest obstacles are ones you didn't even think of—and you may need to revise your strategies and/or tactics to accommodate these changed realities.

- Keep learning. As the facilitator, you can really help your group have a positive and useful experience post-session by supporting them to keep a learning focus. For instance, if a tactic hasn't been completed, rather than looking to see "who's to blame," look at ***why*** it happened: Did it turn out not to be important? Did you over-commit? Were there some unforeseen obstacles that prevented you from doing it? If you get clearer about what didn't work the first time around, you'll be able to improve your planning going forward.

- Celebrate success. It's easy to feel disappointed if the group doesn't do everything according to plan. Just to give you some perspective: in our experience of using this process in corporations and non-profits over the past 20 years, the average group completes about 75% of their plan the first time around. So acknowledge your successes and figure out be even more effective as you continue to work your plan…