

CASE STUDY

Cross-functional Goal & Strategy Planning Workshop



AT A GLANCE

Challenges

- Ensuring three large departments were in active pursuit of alignment of strategic priorities and objectives
- Find an objective facilitator to coordinate an off-site, multi-day workshop on very short notice with very senior, tenured leaders
- Foster an environment that encourages transparency and ideation by key staff while minimizing C-suite influence
- Represent everyone's opinions, identify underlying themes and ensuring future traction with the most important needs

Benefits

- Objective facilitator able to see above the participants' day-to-day
- Consultative background to foster conversation and tease out points.
- Methodology for gathering, sorting and analyzing input, ensuring participation and inclusion

OBJECTIVES

The CPO, CTO and CCO of a large, global customer engagement SaaS company sought to synchronize their product, engineering and professional service teams' top departmental objectives and focus areas that would most benefit customers, with the end goal being the formation of 3-4 inter-department project task forces.

With only a few days of prep, I was asked to gather advanced input from participants on what they felt were the top opportunities, develop a 2-day workshop agenda, and ensure the workshop would facilitate each team member's open participation while keeping the C-suite in purely active listener roles so as to not steer or influence the group.

SOLUTION

I collaborated with the CPO to develop a short set of key questions and gathered advanced input from each participant. I analyzed their feedback and identified key themes, sorted each piece of input into the themes, created short headlines to represent each point, and prepared large theme-based colored sticky notes, one for each headline from each participant. I then developed a points-scoring system and provided each person a set amount of voting "tokens".

In the workshop room before the first session, I prepared one flip-chart per theme and attached the sticky notes to the appropriate theme. The workshop agenda allocated time for each person to present their topics and explain their rationale and point-of-view which was then open for discussion with their peers. Along the way, I facilitated conversations by making observations, restating or clarifying points, connecting topics, gauging reactions and opportunities, reminding the C-suite of their listening role, and managing time where needed to keep the conversation productive and moving along. At the end, participants voted on the themes by using their point tokens and the themes with the most points formed the new inter-department task forces.

BENEFITS

Objective Facilitation

Not being involved in much of the participants' day-to-day allowed for a more objective point-of-view and unemotional perspective.

Consultative Guidance

Experienced in leading small and large groups in conversation to gain alignment and consensus for moving forward with shared goals and respect.

Proven Methodology

Systematic methods to organize, quantify, simplify and present subjective opinions and experiences toward clear, irrefutable outcomes.