

# A sample of a completed project

## Executive summary: Strategy Scoping for ClientCo Inc.

### Background



ClientCo Inc was founded 10 years ago to build digital products for marketing agencies to sell to their clients. Profitable from Year 1, they now have 65 staff, working remotely across three continents.



Kerry, Chair of ClientCo's Board sought advice from Goal Atlas on how best to manage the relationship between the Board and the Leadership Team, during the production of their new strategy.



Following initial conversations with Kerry, and ClientCo's leadership team, the key issue was agreed to be strategy scoping:

- What are the aspirations and drivers of the new strategy?
- What needs to be done, by whom and by when?
- How will it be decided whether the strategy produced is good enough or whether more work needs to be done on it?

### Our Brief



Goal Atlas was asked to facilitate a Strategy Scoping Workshop for ClientCo's leadership team and key board members.



A key requirement was that strategy scoping principles should be agreed during the workshop and that a draft strategy scoping document produced within a week after the workshop.

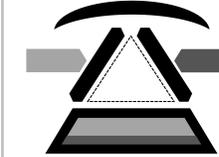


Goal Atlas proposed:

1. A quick analysis of ClientCo's existing strategy, vision, mission and values.
2. Initial stakeholder interviews with up to four key individuals.
3. Secure outline agreement of processes to be undertaken in the workshop with Chair and CEO.
4. Prepare for and facilitate the 4-hour workshop.
5. Write up a draft strategy scoping document.

### Our Work

We undertook this work over a 4-week period



Analysis, using our House of Strategy Model, showed that ClientCo's vision, mission and values were well aligned and could remain unchanged.



Stakeholder interviews revealed a high degree of agreement on three major strategic priorities and varying levels of disagreement on seven other potential priorities.



The workshop discussed and refined a strategy map, prepared in advance by Goal Atlas. By applying integrative thinking to key areas of disagreement, a scope for the new strategy was agreed. A Strategy Scope document was subsequently signed of by both the senior leadership team and the board.



ClientCo Inc and all its staff are fictional. The work we describe is actual client work undertaken by Goal Atlas Ltd, although the details of individual projects have been combined or adjusted to protect client confidentiality.

# How effective is your strategy development?

Strategy development services



"I just need a strategy and I need it now"



"We have people pulling in completely different strategic directions"



"I need to write a strategy but don't have anyone with the skills or experience to know how to do it well"



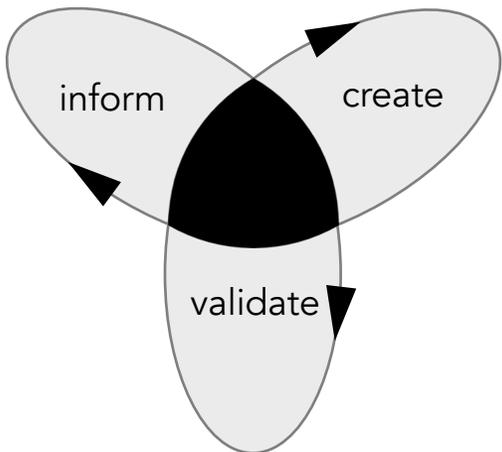
"We've been working on this strategy for weeks now and it's still not done"

## Helping you develop your strategy

- Making your development process more systematic and more transparent
- Scoping the purpose of your strategy and its acceptance criteria
- Implementing a structured decision-making and strategy validation process

See how we work and how to engage with us

## How we structure strategy development



Strategy development loops through three key activities, that inform the new strategy, create the new strategy and then validate the new strategy.

### Inform

We help you scope your new strategy by identifying:

- your aspirations and drivers;
- alignment with vision, mission and values;
- key decisions needed, evidence needed and jobs to be done;
- acceptance criteria for your new strategy.

### Create

We offer tools you can employ to enable:

- divergent thinking;
- convergent thinking;
- framing by different strategic models (e.g. Value Proposition Design, Stakeholder Analysis).

### Validate

We help you validate your strategy against:

1. acceptance criteria devised during strategy scoping;
2. a tailor-made strategy design checklist.