

STRATEGIC ADVISORY SERVICES: EXPERT STRATEGY FACILITATION

1. Strategy expertise

Our facilitators and experienced strategy experts are able to guide, steer and challenge clients on their strategic issues and business imperatives. Our lead facilitator is Paul Aucamp. For a major part of his career, Paul has been in management consulting (since 1987). In this period, he has fulfilled leadership positions at Deloitte & Touche, IBM Consulting Group and Bentley West Management Consultants (the latter two firms were both founded and led by him). Apart from his consulting career, he has also held other line management positions - either as executive director or turnaround CEO. He has served on the EXCO's of two listed companies and has been a member of a number of Boards.

In his long career, Paul gained significant strategic insights and industry expertise in the following sectors: Banking, Life Assurance, Process and Discrete Manufacturing, Information and Communications Technology, Media and Broadcasting, Telecommunications, Mining, Postal Services, Construction, Transport and Logistics, Retail, Agriculture, Professional Services, Petro-chemical and Utility services.

2. Process

Our strategy workshops provide value firstly by providing attendees with a workshop preparation pack containing relevant strategy material for pre-study and preparation. Depending on the type of facilitation engagement, the preparation pack may also contain pre-processed client information / templates ready for workshop use.

Secondly, our strategy workshops include group exercises to populate a variety of strategic planning tools and models that provide strategic insight and better understanding of strategic issues the organisation is facing. This approach is useful to guide and convert the discussion and debate into meaningful terms for strategic decision-making and strategy implementation purposes.

After the workshop, we supply the client not only with a document containing the synthesised workshop proceedings, but also make independent recommendations as to how to proceed to finalise and implement its strategy.

Whilst heavily process-based in the background to ensure that the programme will be completed in time and achieve its objectives, our strategy workshops are not the dreary SWOT and mission type exercises.

3. Value proposition

- **Results orientated workshops**

Our strategy workshops do not get bogged down in academic, SWOT and vision statements. Instead, while taking full cognisance of where the client is and what it is facing, we focus on where to go and what to be, and most importantly, how to get there.

Our strategy workshops not only translate strategy into operational terms for purposes of implementation, but also conclude with decisions, action plans, and accountabilities for execution.

- **Balanced workshops**

We balance the rational, emotional and political aspects in our strategy workshops by maintaining the integrity of strategy, whilst ensuring buy-in and ownership, and acceptability to all stakeholders amongst the workshop attendees and the client organisation.

Our strategy workshops are also balanced by spreading time over and alternating between discussion, debate, process and group exercises.

4. Strategy workshop objectives

- **Strategic clarity**

The first strategy workshop objective is to achieve strategic clarity in terms of the articulated and clearly understood concept of the desired future state in term of vision, core purpose, core values, mission, positioning and customer value proposition.

- **Leadership alignment**

The second strategy workshop objective is to achieve leadership alignment and focus around the roadmap for the future in terms of agreement, common understanding and shared views. Leadership alignment also provides renewed energy, excitement, rigour, discipline, commitment and urgency to achieve strategic clarity and implement strategic plans.

- **Strategy translated into operational terms**

The third strategy workshop objective is to translate strategy into operational terms. The vision and mission and competitive strategy are translated into strategic objectives, measures, targets and initiatives using the Balanced Scorecard.

5. Strategy workshop logic

The workshop determines where the business is, where and what it wants to be, and how it will get there.

- **Where the business is now and what it is staring in the face**

The workshop starts with the traditional SWOT (strengths, weaknesses, opportunities, threats) analysis and issues assessment. We use PESTLE (political, economic, social, technological, legal, environment) analysis to determine trends in industry drivers.

Opportunities are ranked in terms of attractiveness and success probability. Likewise, threats are ranked in terms of seriousness and realisation probability.

The SWOT analysis is followed by market segmentation. Decisions about targeting market segments is made by ranking business units in terms of competitive position and market attractiveness, which provides guidance to invest and pursue, hold, or avoidance.

We also plot business units on a market share / growth rate diagram to determine the mix of question marks, stars, cash cows and dogs in the portfolio.

The present customer value proposition is analysed by ranking the importance of each value attribute to customers, as well as how well the business and its competitors score on each value attribute.

- **Where and what the business wish to be**

The workshop determines the vision of the business in terms of an envisioned future and core ideology, with the latter consisting of the core purpose and core values.

This is followed by the desired mission in terms of the business domain, described in terms of which products are supplied to which customers, what technology is employed, and in which stages of the commercial value chain the company choose to operate.

Competitive strategy is described in terms of overall cost leadership and or differentiation, on a company-wide basis or focussed business unit basis.

Lastly, an appropriate customer value proposition is defined based on customer value discipline of operational excellence, customer intimacy or product leadership.

Gap analysis is used to either tone down on future expectations, or to upgrade decisions to overcome weaknesses.

- **How the business will get there**

We use the Balanced Scorecard to map strategy in the workshop. The vision, mission, positioning and customer value proposition is translated into strategic goals per perspective - financial, customer, internal, and learning and growth. For each strategic goal, a measure or initiative is determined, with a target or timeline. Lastly, initiatives are ranked in terms of impact and ease of implementation.

6. Types of strategy workshops offered

1. Cold facilitation

Cold facilitation requires little preparation and is purely process-driven. With cold facilitation, our facilitators are not expected to add value other than ensuring that discussions are focussed and that the group reaches consensus.

2. Informed facilitation

The more background and knowledge our facilitator has about a client and its strategic situation and issues, the better workshop planning, preparation and structuring can be done in line with strategic needs.

We prefer to spend a day with a client prior to the workshop to conduct focus interviews and studying past strategic planning documentation. Alternatively, a client can furnish us with relevant strategic information beforehand, but this approach is less effective.

Our facilitator's strategy value-add is limited to interpreting what the client provides and by how much he or she knows about the client.

3. Strategy workshop as part of strategy work

A facilitator assesses a client's strategic situation beforehand by means of focus interviews and desk research. This is the most effective strategy workshop option. The full set of strategic planning toolkits can be applied, and it provides the best results for subsequent strategy implementation.

The facilitator acts as a formal strategic advisor from a position of knowledge and insight.

Typical strategy workshop programme

- Setting the scene
 - Opening & introductions
 - Workshop objectives
 - Agenda review
 - Expectations exchange
 - Ground rules
- Where are we now? What are we facing?
 - PESTLE analysis to determine industry driving forces
 - Competitor analysis
 - Market analysis
 - Portfolio analysis

- SWOT analysis
 - Market targeting - current & future possibilities
 - Positioning - current and future possibilities
 - Customer value proposition - current & future possibilities
- Where & what do we wish to be?
 - Vision - stated in terms of a BHAG (or Big Hairy Audacious Goal) and a vivid descriptions thereof
 - Core purpose guiding the vision
 - Core values guiding behaviour
 - Mission - describing the business domain or business boundaries
 - Competitive strategy - lowest cost, product leadership, complete customer solutions or customer lock-in
 - Customer value proposition
 - Gap analysis
 - How will we get there?
 - Strategic themes.
 - Strategic objectives in financial, customer, internal, and learning & growth perspectives
 - Measures, initiatives, targets, accountabilities
 - Implementation prioritisation
 - Wrap-up
 - Summary of decisions
 - Next steps
 - Workshop evaluation (Plus / Delta)

7. Further information & contact details

Please contact CGF for further information on +27 (11) 476 8264/ 1/ 0 or email accounts@cgf.co.za or email tbooyesen@cgf.co.za or Paul.aucamp@palstrat.co.za

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