

Platinum Leadership
Business Alignment Model®

Coaching and Case Study Worksheet: Strategy

By Andrew Bartley, PCC, MDiv, MBA and Corinne Walsh, MA, LLM
Principals, Platinum Leadership Inc. © 2015, 2018



Platinum Leadership
Business Alignment Model®

Leadership and organizational coaching can be effective vehicles to prompt systemic analysis, awareness and action. This worksheet provides open-ended questions and a case study for each element of the Platinum Leadership Business Alignment Model®. Visit platinumleadership.com to download resources and see the model in action.

STRATEGY: A plan to translate ideas into action to achieve objectives over time.

A strategic plan directs an organization to its desired future, and includes high-level goals and objectives to get there. Strategies are specific plans or ways of acting designed to accomplish a long-term vision. All organizations have strategy, whether or not it is explicitly stated. An operational plan provides specific directions for employees to implement strategy within shorter time frames. Formal strategic planning is usually necessary to maximize success in competitive environments.

Coaching questions for your organization:

- How could our strategic planning be more focused on attaining our long-term vision?
- How effectively does our strategy set direction, marshal resources, and focus effort?
- How is our strategy in tune with what we can do, need to do, and want to do?

Change Management: A strategic best practice to consider

Ensure your strategic planning includes the fingerprints of the employees you'll count on to implement the plan. Before convening formal strategy sessions with a few key leaders, engage in meaningful stakeholder consultation with a wide cross-section of employees, clients and suppliers. Before finalizing the plan, let stakeholders know how they influenced the plan's development. When a person feels they have had meaningful contributions, their stake in the plan's success and commitment to its implementation increases.

Case Study: A well-established, family-run restaurant on the outskirts of town has served relaxed, dine-in meals from Monday to Saturday from 7:00am-9:00pm for two generations. Its vision is to "be the destination of choice for family and friends gathering for hearty meals away from home." With the building of two huge new subdivisions, traffic at the restaurant's intersection has steadily grown. To increase profits, the family has decided to open the restaurant 24/7, and to install a drive-through window. The decision has surprised many employees, most of whom do not want to work nights, Sundays, or at the increased pace of a drive-through.

- What impact will this strategy have on achieving the restaurant's vision over time?
- What risks have been introduced to the business through the 24/7, drive-through strategy?
- How could the family manage these risks and strike a new balance in their system in terms of leadership, strategy, vision and culture? What steps might be helpful?