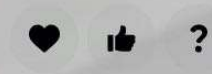




Collaborative Strategy Making in a Hybrid World - a Digital Interaction Approach





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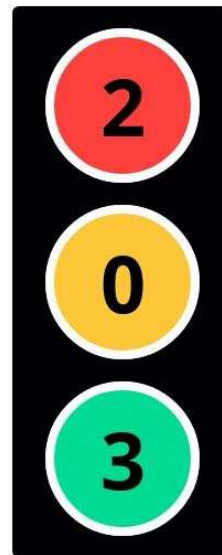
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Thanks for participating today!



LET'S GET STARTED (AND TEST THE TECH)

How are you feeling today?



Could be better

Treading water

Awesome!



What am I passionate about?

Developing strategy
and structuring
change

Facilitating better
meetings (virtually)

Making better
decisions

Understanding how
organizational culture
drives performance



Measuring and realizing
transformation benefits





After today's session, you will ...

Know more about

**digitally-enabled collaborative
strategy making,**
(based on *Sightline*)

from me (and each other)



Our Agenda Today

- What is **Strategic Planning**?
- The **Digital Sightline** Approach
- My Digital Toolkit
- Two Client Stories
- Questions



A blurred background image showing a wooden conference table with several people's hands and arms visible. The table is covered with various documents, including spreadsheets and charts, and many colorful sticky notes (yellow, pink, green) are placed on the papers. The scene suggests a collaborative meeting or workshop.

Let's start with a question



For strategic planning initiatives that you've been involved in, what was your role? *(multiple answers are allowed)*



0
Haven't been involved

3
As a stakeholder and/or participant

3
As a consultant and/or facilitator

2
As a leader and/or sponsor (executive team or board member)

0
In another role (i.e. not one listed here)

Two-day Offsite Strategic Retreat

Participants

- Members of the Board
- Senior Executive Team
- Strategic Planning Lead
- Strategic Task Force

Activities

- Motivational + Guest Speakers
- Speeches from Leadership
- Table Topics + Report Outs
- Break Out Groups
- Opportunities to Socialize!

Outputs

- Mission, Vision and Values
- Strengths, Weaknesses, Opportunities and Threats
- Strategic Goals
- Action Plans

This is an example of what strategic planning used to look like



It was great to meet but let's acknowledge the challenges

- Pressure to perform
- Expensive and a logistical nightmare
- Underwhelming outputs
- The loudest voice(s) dominated

There is a different way

- Let's accept the **NOW** (not the FUTURE) of meetings and collaboration is **HYBRID**
- Let's re-engineer with a combo of innovative collaborative processes, digital interactions, and *nimble* facilitation



Process



From the Expert Panel: What's a good strategic plan and process look like, and how do you make it happen?

Collaborative Focused

A clearly defined end state

Not a single shot

One that becomes a working document

Shared

A roadmap but with a process for adaptive planning

Actionable, realistic

Clear corporate direction that allows initiatives to be aligned to these.

meaningful (and not full of management speak, Dilbert!)

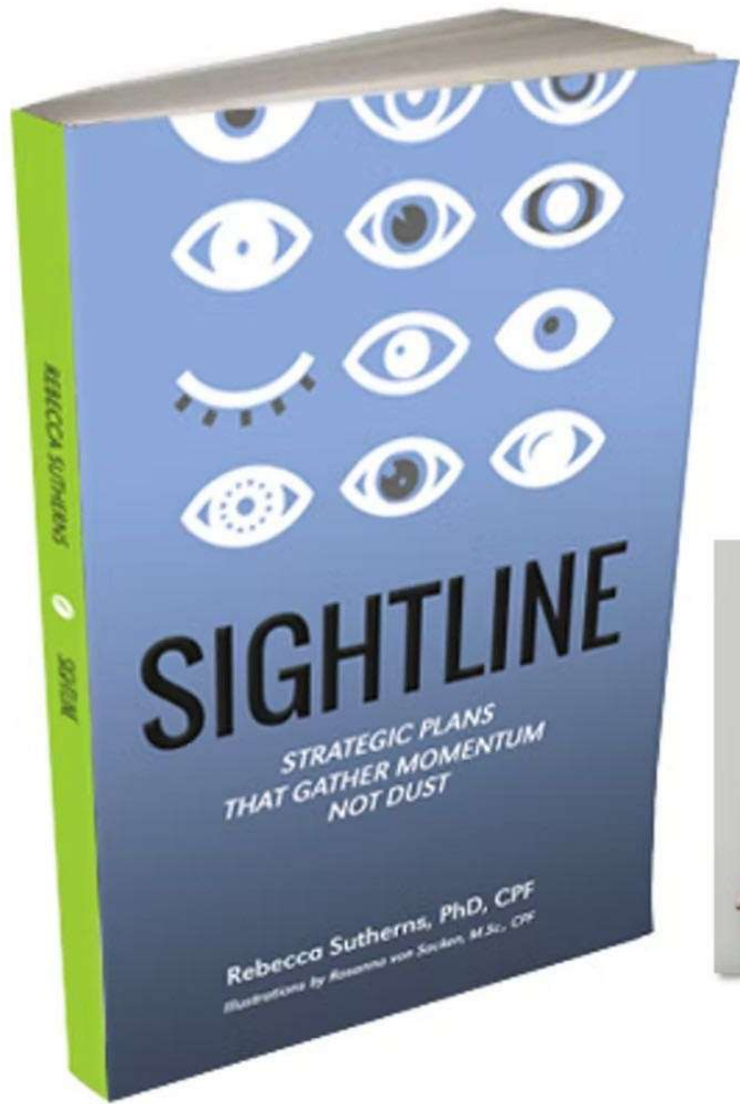
From the Expert Panel: What's a good strategic plan and process look like, and how do you make it happen?

Highlights and enhances stated values of the organization

understandable

Clearly defined accountabilities

Participate Buyin of the process being used



Sightline – Strategic Plans that gather momentum not dust

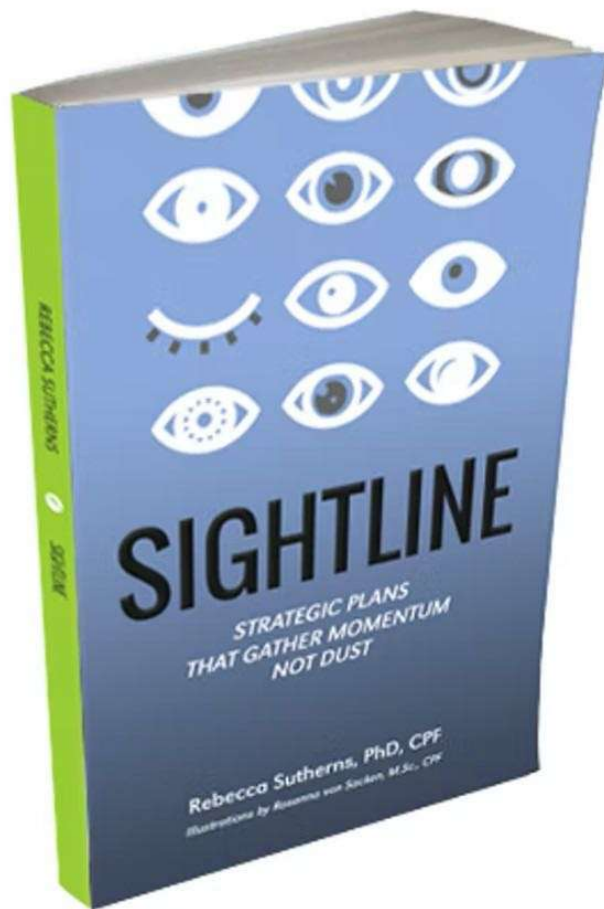


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Director, Canada Region, International
Association of Facilitators (IAF)

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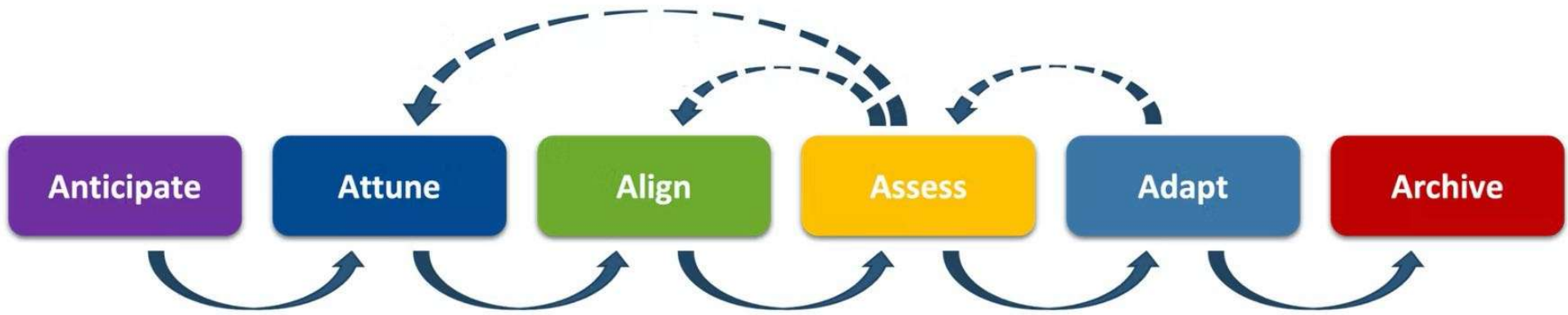
LET'S DEFINE OUR TERMS



***Strategic planning* is the process by which your organization decides where it's going and how best to get there, over a certain period of time**

- Fundamentally about setting directions and making decisions
- Underscores the "why" of your organization
- Sets your destination, your route, and your pace
- Process is intentional, integrated, iterative and ***collaborative***





Anticipate what might be required

Become intentionally **attuned** to your environment

Align your organization's plans with the relevant features of that environment

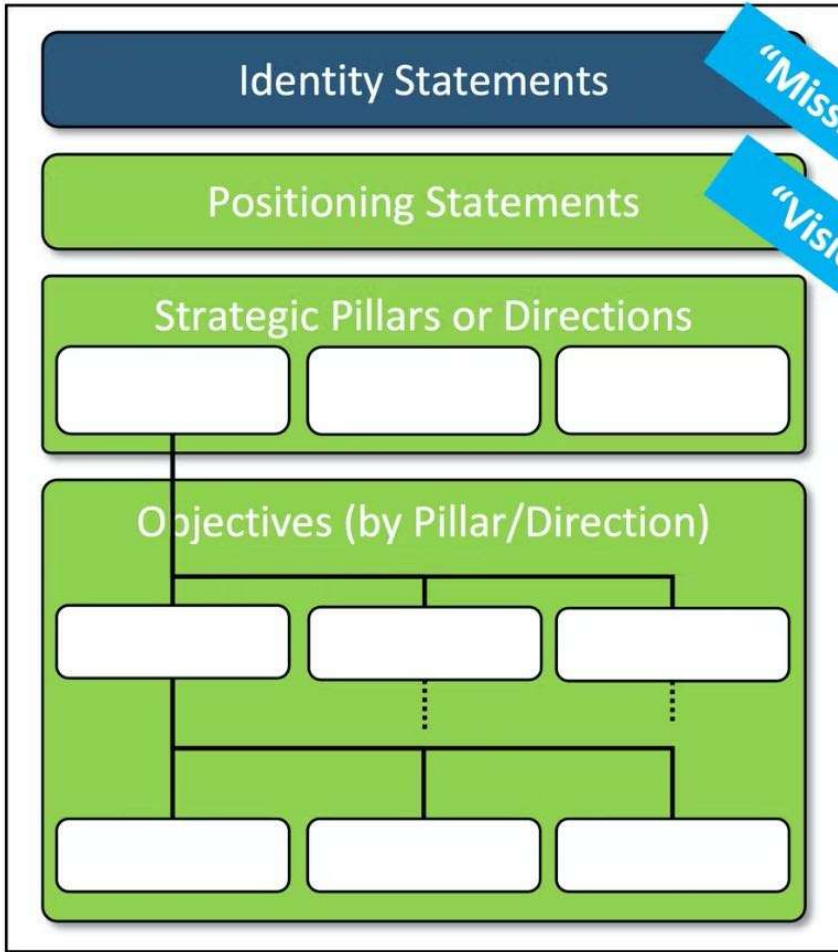
Assess how well your draft plan matches your aspirations for it

Adapt your deployment of resources to achieve that alignment

Maintain an **archive** to bolster organizational memory by documenting what you did to get there and why

Sightline's Strategic Planning Process





What done looks like with Sightline





Sightline's 16 Deliverables in the Process





Digital Interaction

slido

What's different about facilitating digitally enabled interactions?



Some things stay the same



Expand the tent. Challenge assumptions about who and how many stakeholders to involve. With tech, more voices can be heard, but be mindful of unintentional exclusions.

Crawl, walk, jog, run. Plan for simpler exercises at the start and build from there. Use the tools for planning with the core group to start with!

Break it down. Divide the process into digestible steps – aim for 2 hours and no more than 3!

Mitigate biases. Learn how tools + techniques help mitigate negative group dynamics and participants' cognitive biases.

Take the time. Extend the overall elapsed time, as compared to a typical intensive multiple-day process. Allow participants to rest and reflect.

Plan to adjust. Frame the interaction as a learning opportunity. Check in with the group and adapt as required.

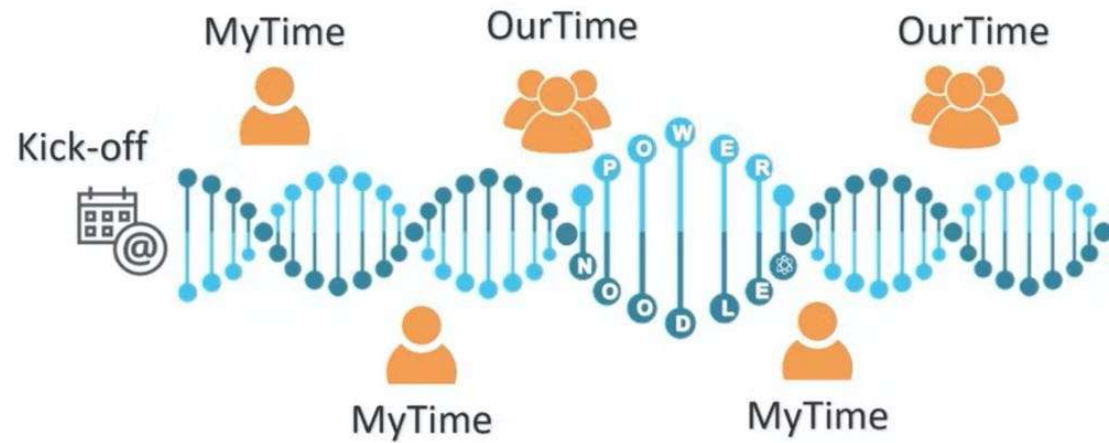
Align activities. Not everything is done together at the same time. Many activities are better done alone, like assessment of options.

OurTime **MyTime**

Believe. A well designed and facilitated *digital* interaction process that involves more perspectives will result in a better work product and greater stakeholder buy-in.

Some things are different



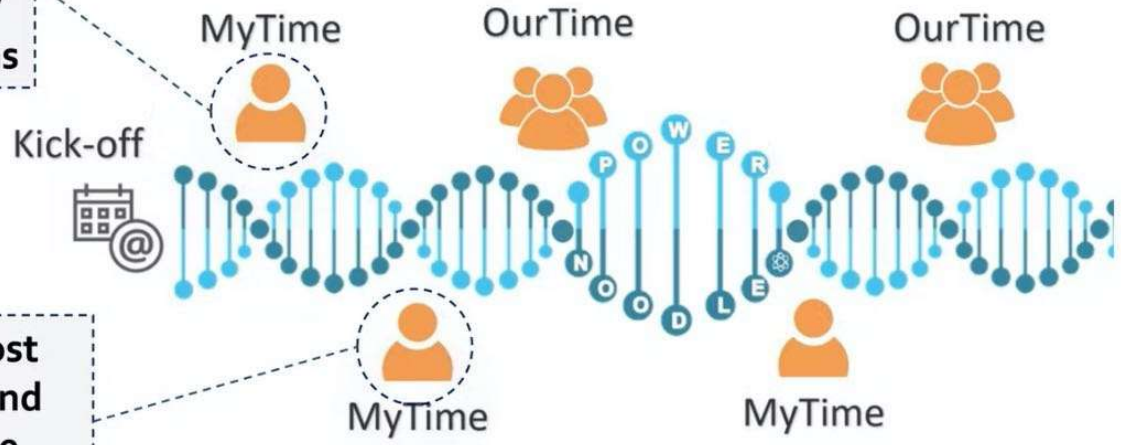


Source: www.powernoodle.com

Not just one meeting – it's a series of linked interactions



Review SWOT report, plus group online "dialogue" on the implications

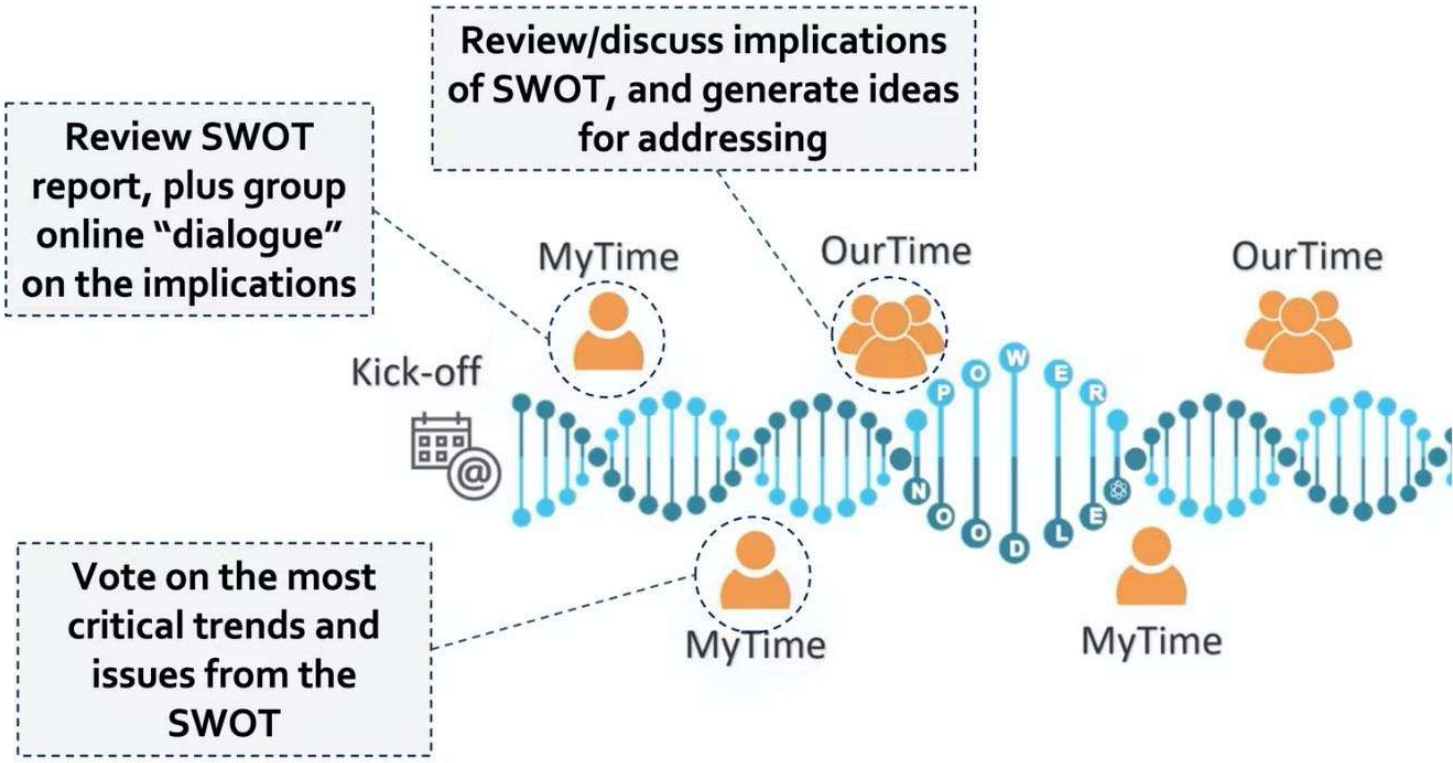


Vote on the most critical trends and issues from the SWOT

Source: www.powernoodle.com

Asynchronous work by the group (MyTime) leads to ...

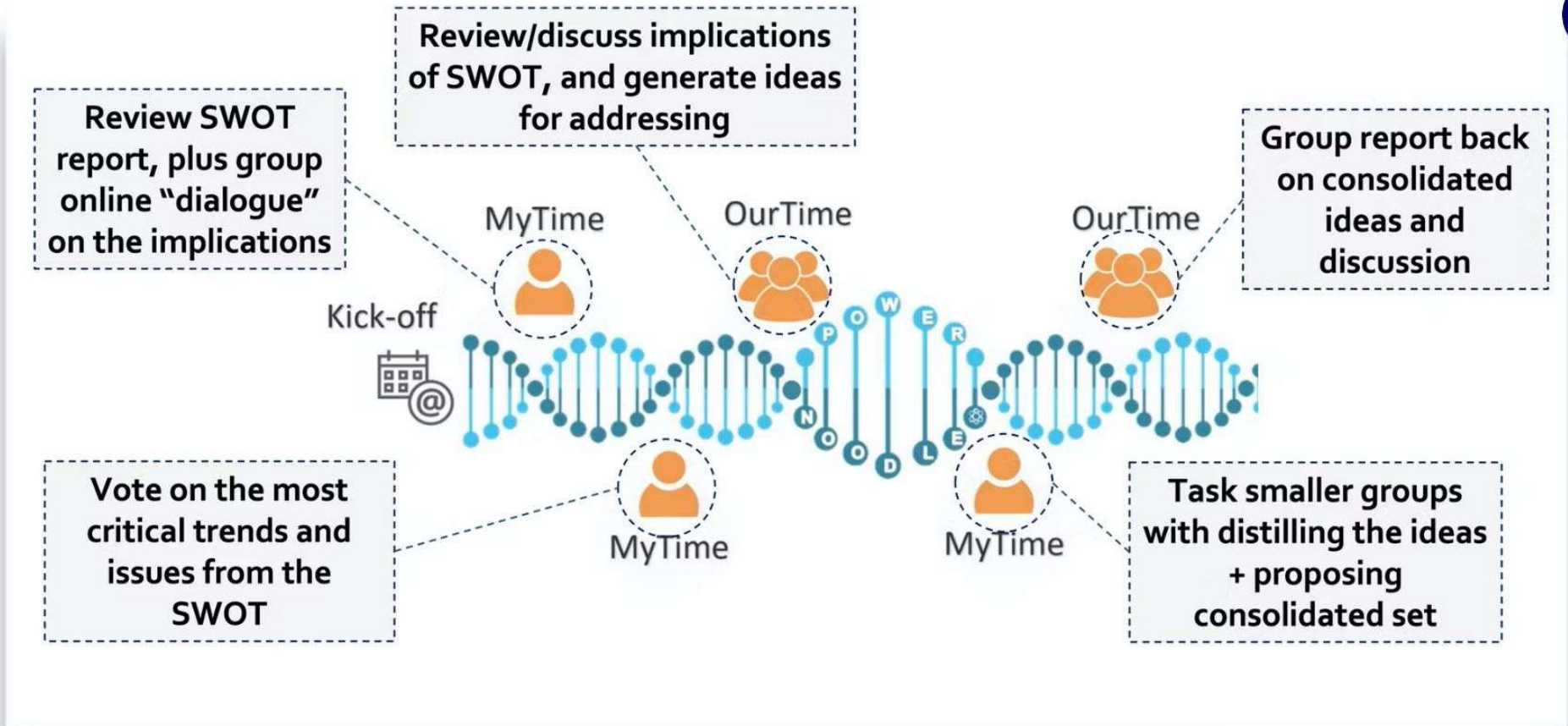




Source: www.powernoodle.com

... focused and productive synchronous group work ...





... leading to the next set of async/sync interactions.



<i>MyTime</i> Activity (asynchronous)	Week#	<i>OurTime</i> Activity (synchronous)
	1	
	2	Understand Impacts + Implications
	3	
	4	Explore Context + Develop Identity Statements
	5	
	6	Develop Positioning Statements + Directions
	7	
	8	Create Goals + Build Objectives
	9	
	10	Propose Metrics + Activities
	11	
	12	Review + Refine



A *Sightline* based digital interaction scenario



MeetingSphere®

GroupMap 

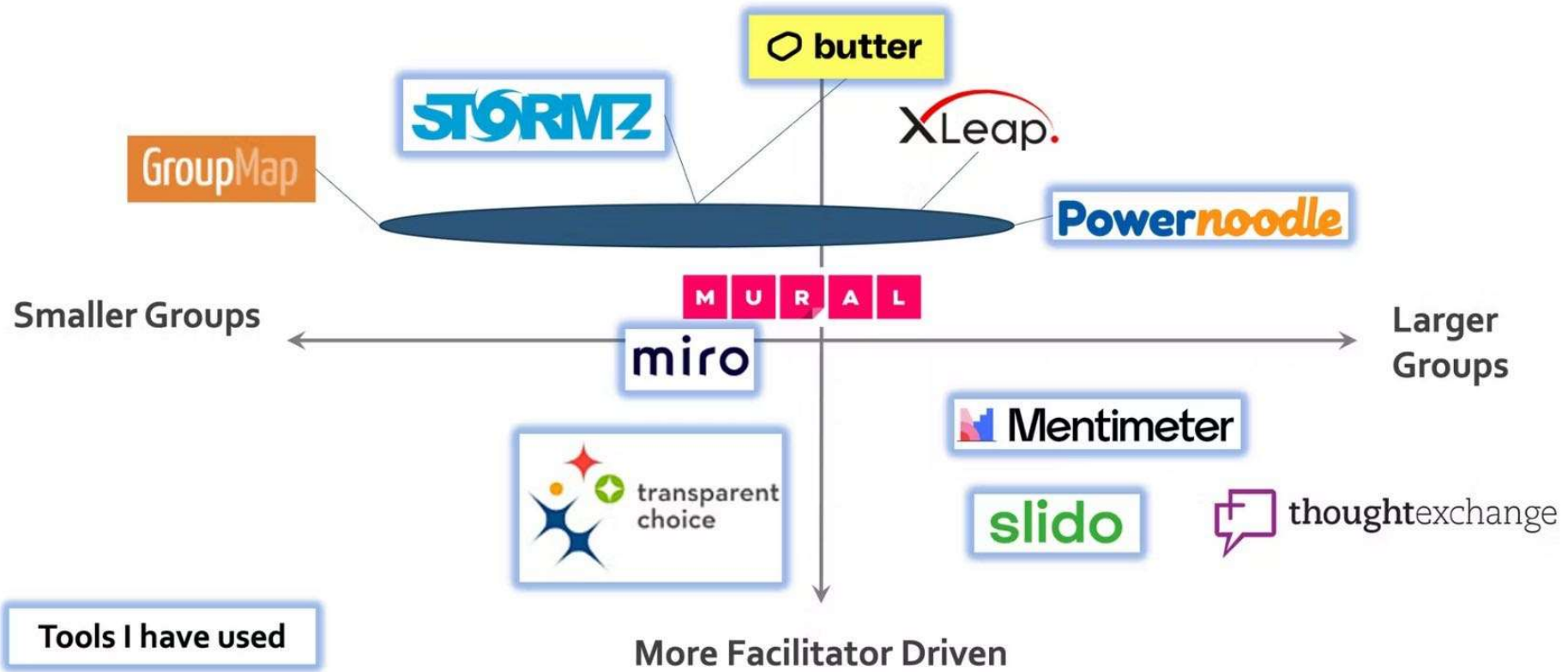
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TOOLS
POWER TOOLS Menti meter

M U R A L

 transparent choice

miro 

More Group Managed



Spectrum of digital group interaction cloud-based tools



For stakeholder input and consultations (especially larger groups)

For more intensive collaboration (divergence to convergence, esp. strategic planning and direction-making)

For co-design, like customer experience journeys, strategic foresight, and process redesign

For structured prioritization and multi-criteria decision-making

Spectrum of Interaction Use Cases for Consultations



An enterprise AI-infused platform that drives fast, in-depth discussions at scale



Allows for the design and facilitation of any kind of in-person or virtual collaborative workshops: retrospective, brainstorming, design thinking and many others.



An online collaborative whiteboarding platform to bring teams together, anytime, anywhere.



Helps organizations make better decisions (strategic choices, portfolios of change, etc.), with stronger buy-in, based on the Analytical Hierarchy Process



An interactive presentation and group engagement platform with features that enable the preparation, facilitation and analysis of presentations, webinars and consultations.

My current digital toolkit the design + facilitation of fit-for-purpose interactions



Technical glitches and interruptions impact communication ... and ultimately understanding

Loss of visual/body language queues, and decreased personal connection

Need for facilitation is even greater – there are always dominant voices and personalities, amplified when virtual

Too much dependence on presentation inhibits participant engagement – and it's boring!

By definition, trust starts low ... and is hard to build

Disciplined preparation required: agenda, technology instructions and checks, plus rehearsals

Larger group workshops are especially problematic

While use of video is encouraged, bandwidth is impacted, causing distortions ... and not everyone is OK with video

Bottom line: Just *virtualizing* what works in-person is a recipe for poor stakeholder engagement and interactions

Challenges I've encountered



Client story #1

- Greater Toronto suburban library, with 4 branches and over 100 full- and part-time staff
- Last strategic plan update in 2013
- New(ish) CEO - appointed during the pandemic
- Conducted from April to September 2021
- Tools: Mentimeter, Pownoodle



All briefings, workshops, meetings,
and consultations were conducted
virtually



A distinct stakeholder consultation and involvement challenge

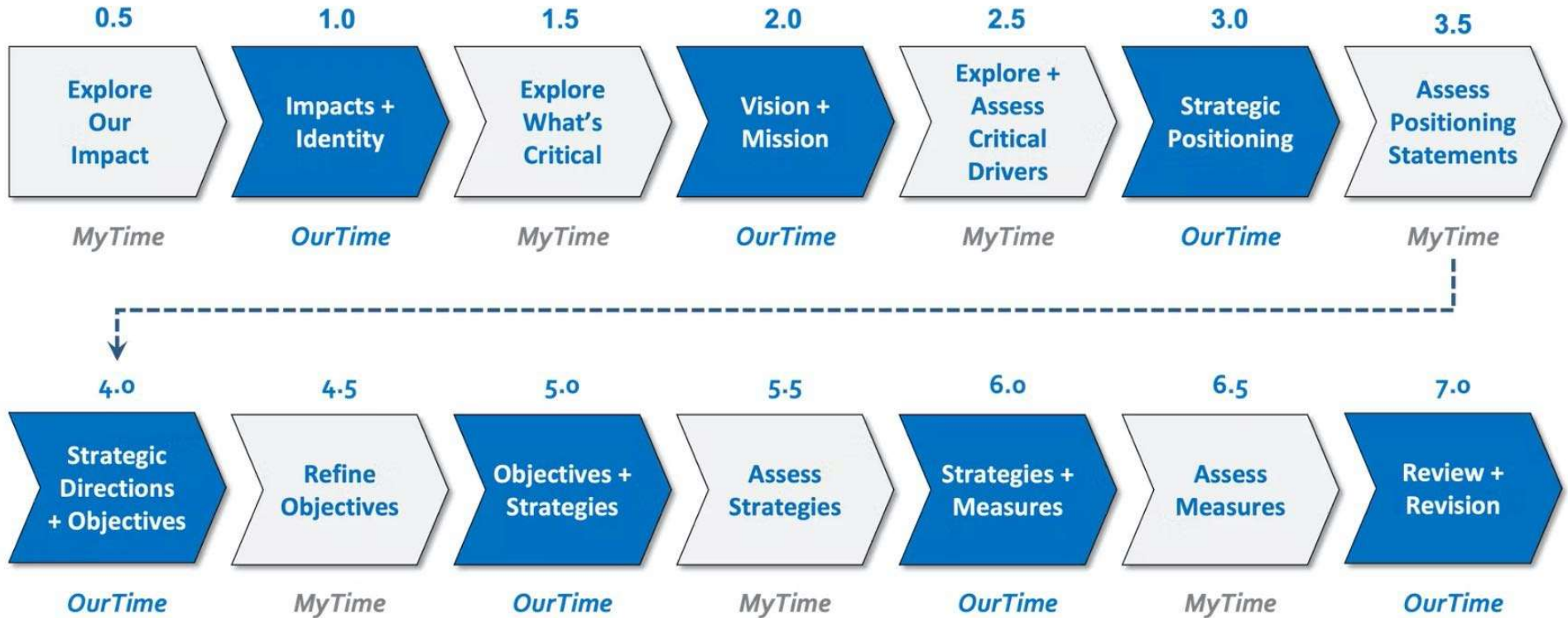
- Town Councillors (Interviews)
- Library Board (3 meetings)
- Steering Committee (4 meetings)
- Executive Leadership Team [4] (4 people)
- Strategy Task Force [13 people + ELT] (7 meetings)
- Community (2 Town Halls and Online Survey)
- Business Groups (Interviews)
- Strategic Foresight Project
- Organizational Culture Survey





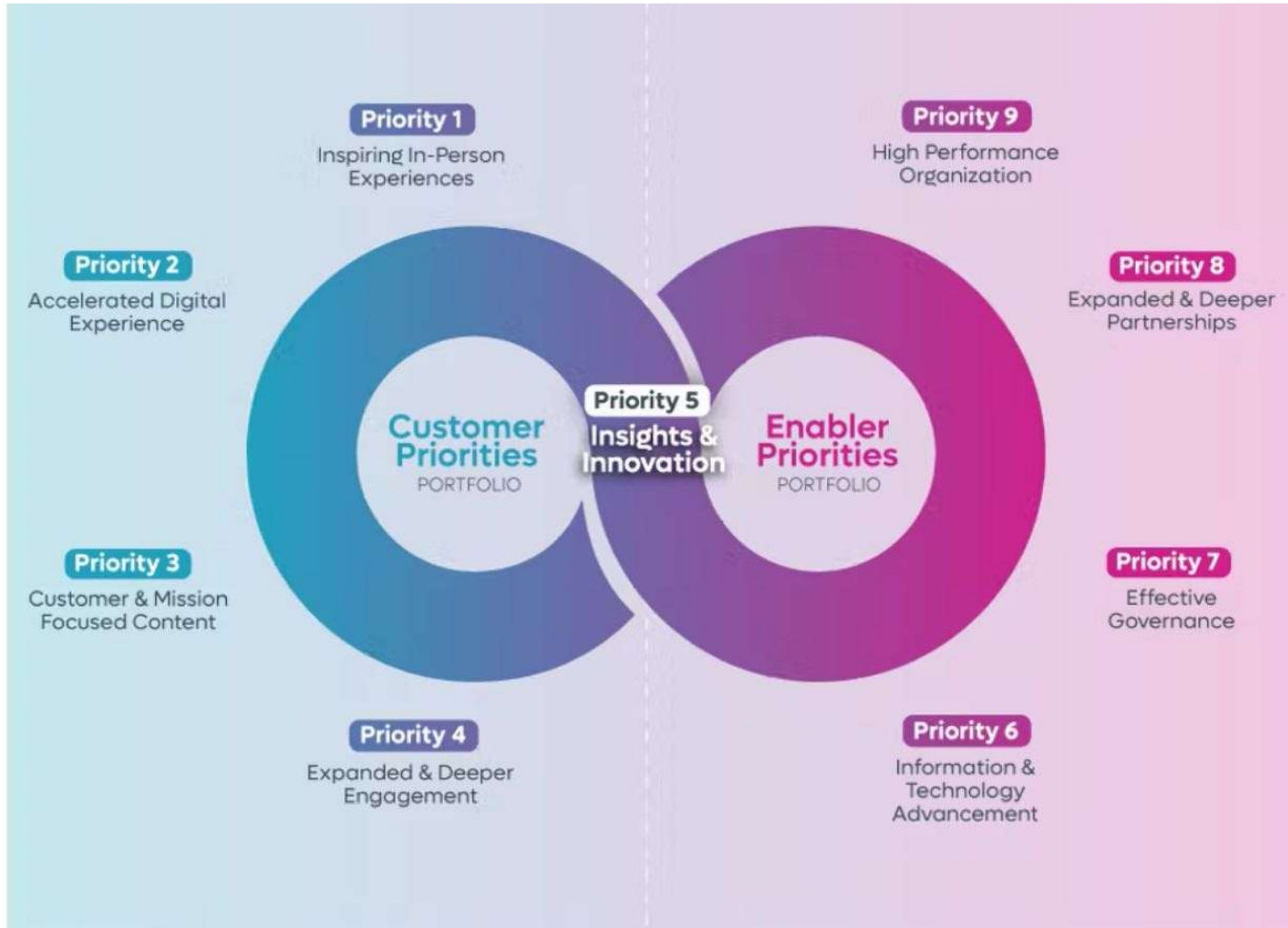
A multi-month effort ... with digital interactions built in from the start





Steps 6 and 7 followed the *Digital Sightline* approach





The Library's Strategic Model





Client story #2

- Large suburb north of Toronto (up Yonge St)
- Ongoing journey to transform its operations and deliver value to residents and partners
- 2019 administrative and service delivery review identified need for broader **digital transformation strategy**
- A **reactive** digital culture -- where IT is isolated from the business and facing structural issues
- Tools: Mentimeter, Stormz and TransparentChoice

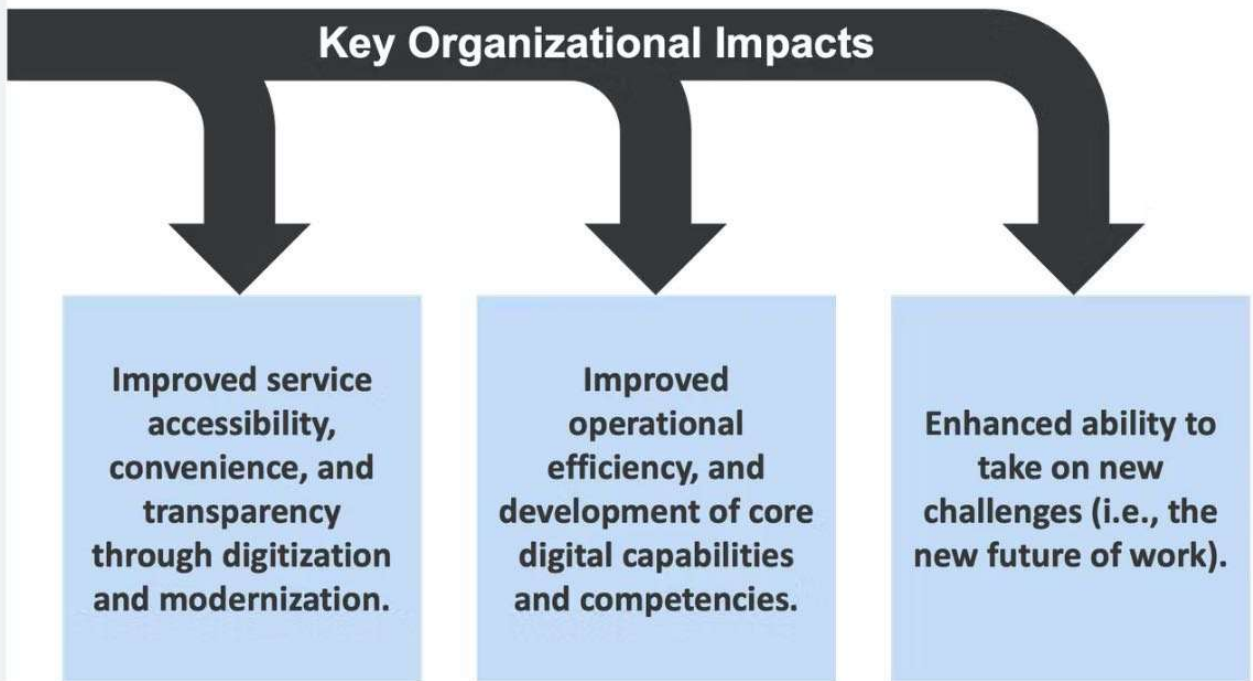




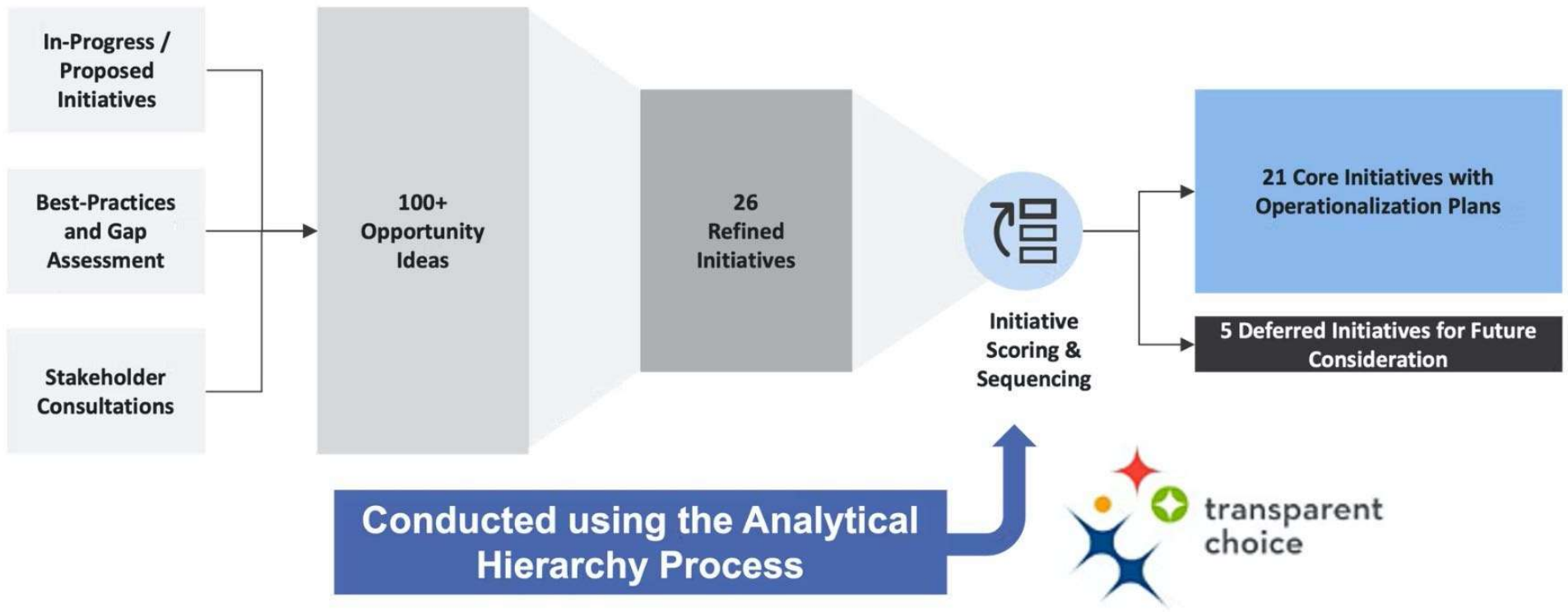
What is Digital Transformation?

Digital transformation is a strategic rethinking of how an organization uses technology, people, and processes to achieve its goals.

Digital transformation assesses current state strengths and weaknesses and identifies opportunities to improve the status quo.



Over 100 “opportunities” were refined into 26 scored and sequenced “initiatives”





Initiatives were scored using 2 primary criteria, each with sub-criteria

Goal: Optimized Portfolio of Digital Transformation Initiatives ▾

0.1% ▾

Criterion	Local Weight	Global Weight
Strategic Value	71.1	71.1
Criterion	Local Weight	Global Weight
Improved service convenience + accessibility	20.8	14.8
Improved information and data access	18.9	13.4
Automated / optimized processes	9.2	6.5
Enable the future of work	18.4	13
Established core digital capabilities	15.5	11
Council and corporate alignment	17.2	12.2
Ease of Implementation	28.9	28.9
Criterion	Local Weight	Global Weight
Capability status	18.9	5.4
Level of dependency	18	5.2
Time to implement	7.2	2.1
Resource requirements to implement	47.4	13.7
Level of complexity	8.6	2.5



Core Digital Transformation Initiatives

Establish Digital Governance, Oversight, and Standards (6 Initiatives)

Illustrative Initiatives

- Design and Implement a Digital Governance Framework
- Design and Implement a Sustainable Approach to User Training

Establish Capabilities to Enable the Future of Work (3 Initiatives)

Illustrative Initiatives

- Digitally Enable the Future of Work Model
- Introduce a Back-End Integration Platform / Standards for Integration

Improve Resident Communication and Service Accessibility (7 Initiatives)

Illustrative Initiatives

- Replace the Town's Website
- Introduce a Resident Self-Service Portal to Centralize Interactions (e.g., tax, utilities, billing, property information, etc.)

Optimize Business Process Productivity (5 Initiatives)

Illustrative Initiatives

- Replace the Outdated Parks and Rec. Management Software
- Implement a Robust HRIS System

The Town's Digital Transformation Strategy





Two Digital Interaction Tips - time allowing

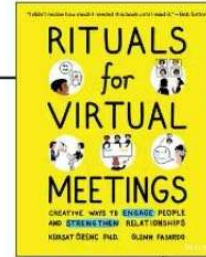


2020 may well be remembered as the year we realized that videoconferences are ... **awkward**.

Virtual meetings are challenging, due to the lack of norms and conventions, unfamiliarity of context, and limitations in technology.

Adding **rituals** to virtual meetings can help make them more ... **humane**, by:

- Helping to clarify, reinforce, and renew purpose.
- Bringing order by giving structure to virtual experiences.
- Visualizing our desired states/goals.
- Synchronizing our virtual interactions by cues, gestures, and phrases.
- Energizing people with emotional/mental payoff moments.



RITUALS
(a definition)
ACTIONS that a PERSON or GROUP does repeatedly, following a similar PATTERN or SCRIPT, in which they've imbued SYMBOLISM and MEANING



The authors describe a variety of rituals that can help virtual meetings:

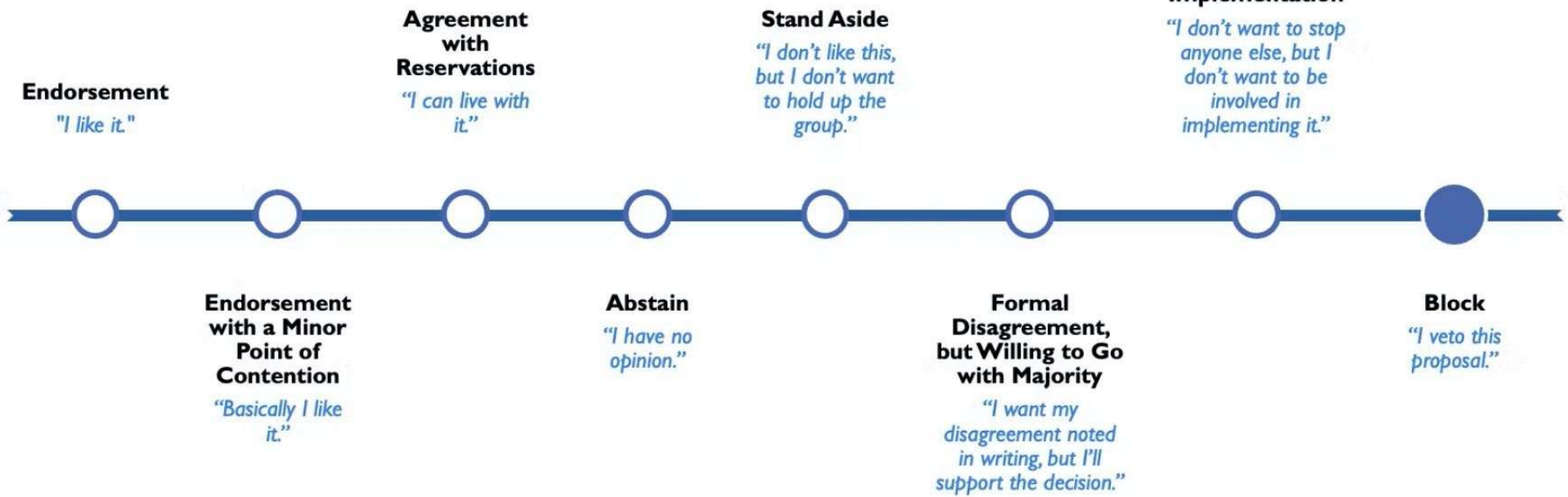
- Beginning and ending a meeting
- Focus, engagement and flow
- Creating connection and building relationships
- Resilience and rejuvenation
- Transitions and shifting culture

Source: *Rituals for virtual meetings – creative ways to engage people and strengthen relationships*, KÜRŞAT ÖZENC and GLENN FAJARDO (Wiley, 2021)

Digital Interaction Tip #1 - Consider using **RITUALS** in your interactions



The **Community at Work Gradients of Agreement** scale makes it easier for participants to be honest. Using anonymous voting, individuals can register less-than-whole-hearted support without fearing that their statement will be interpreted as a veto or block.



Source: *Facilitators Guide to Participatory Decision-Making*, SAM KANER (New Society Publishers, 1996)

Digital Interaction Tip #2 - Seven ways to say yes and one to say no



Let's wrap up!

- An effective strategic planning process can be delivered virtually
- Use a digital interaction approach and the right tools (at the right time and for the right purpose)

