

# Stay Out of the Weeds

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You have been tagged with facilitating a strategy session for your functional or business group. Having participated in such sessions before, you know there are traps that can keep the group from achieving high-value outcomes that will make a difference over the longer term (beyond the next year). One common trap is a group's descent into the weeds of operations and tactics, eating up far too much of the valuable meeting time while truly strategic issues and decisions go looking for a home. In this brief, we'll offer a few suggestions for side-stepping this trap and remaining focused on what matters most.

As a starting point, gain agreement from the group on a working definition of what is, and what is not "strategic." The criteria you agree on can be easily posted on a wall as a touchstone for all as discussions proceed. I rely on four criteria that help groups stay on point with strategic issues and decisions. These are:

1. Potential impact on Direction
2. Level of Risk
3. Potential impact on Results
4. Degree of Futurity

A few words about each will make it clear how these apply.

- If an issue or a decision is truly strategic for an organization, then it has the potential to change or reconfirm the Direction of the organization (i.e., its long-term vision of what it does, where it does it, who it serves, and how it functions; maybe even its central Mission, or Purpose)
- Does the issue or the decision present a level of risk that is significant? Risk of major financial losses, or reputational risk, or risk of loss in terms of market share or market positioning?
- What is the potential impact of this decision on our most important Results measures, particularly on the upside (because "Risk" considers the downside)? Is the potential impact enough to really "move the needle" in terms of financial results or market share?

- And then there is the degree of Futurity – a fancy word for: how “stuck” are we once we go ahead with this? If we can retract the decision easily, with minimal negative impact, there’s a low degree of Futurity. If, on the other hand, to pursue it at all we must “go deep” and be committed for a long while with significant resources, there’s a high degree of Futurity.

Direction, Risk, Impact, and Futurity ... four simple criteria to keep a group tracking on the strategic decisions and issues, and stay out of the weeds – the operational and tactical details that keep the business running day-to-day. Let’s consider a few examples ...

“We need to establish a long-term position in South America, where we have no presence now for any of our toy lines. An acquisition is possible, or we could build a plant, invest in on-the-ground talent, and greenfield it.”

- Direction: well, it does reconfirm toys as our direction, but expanding to another continent might well be considered a shift in Direction;
- Risk: either of the two choices, and perhaps others to consider, will present considerable financial risk, as well as reputational risk if the effort fails;
- Impact: if successful, this could open a major new revenue and profit stream for years to come;
- Futurity: they’re not likely to be able to extricate from the effort easily or quickly once undertaken.

Does an issue or decision need to meet all four to be “strategic”? No – even one in a serious way will qualify for group tackling.

How about this example for an HR Department looking out three years:

“The lead division plans on tripling in size and geographic reach within three years. That calls for a lot of recruiting, assessments, hiring, onboarding, and training. We should consider outsourcing some of those functions rather than build all that capability internally.”

What do you think: strategic or operational? From the corporate or division level, one would likely describe this issue as “operational,” but for the HR Department, these are strategic issues to resolve: Direction, Risk, Impact, Futurity. So, what qualifies as “strategic” depends as well on the context, or frame of reference, and the nature of the organization itself. What may be operational for you could be strategic for me.

Maximize Your Meeting Efficiency

To make the most of your meeting time, use a pre-meeting package. I rarely facilitate a strategy session without providing one to participants. In this case, where you want to highlight and prepare everyone to focus on truly strategic issues, you would gather from the individuals in advance all the issues or decision points they consider strategic and important to tackle. You would then prioritize them based on the four criteria I've described.

Next, re-circulate that content for confirmation beforehand, with instructions to come prepared with data, background, and their thoughts about those issues. Now you're ready to make the most of the group time as you explore the advantages and disadvantages, risks/rewards, and business cases behind each strategic question the group must address. With this approach, we leave the weeds behind.