

A full-page background image showing two hikers on a rocky cliff. One hiker is standing on the edge of the cliff, reaching out to help another hiker who is hanging off the edge. The sky is a mix of blue and yellow, suggesting a sunrise or sunset. The hikers are wearing backpacks and outdoor gear.

ASCEND 2

Set Clear Strategy and Goals

LEAD

Total Time: 2 hours, 55 minutes

- Break: 5 minutes

Facilitator Summary



LEAD

Summary:

- This course aims to provide participants with a shared framework for strategic discussions and equip leaders with the skills to develop strategic plans that align with overarching strategic objectives. The course emphasizes the importance of long-term initiatives and guides participants in analyzing strengths and weaknesses at both team and organizational levels. Additionally, participants will gain insights into effective change management and learn strategies for pivoting when necessary through group discussions. By the end of the course, participants will have a solid foundation in strategy development and be equipped to drive positive organizational outcomes.

Learning Objectives:

- **Develop** a deeper understanding of the strategic cycle and framework at DISH to inform strategy development and implementation.
 - Participants will gain insights into effective change management practices and strategies.
 - Participants will gain insights into the three levels of strategy and their role within it.
 - Participants will gain insights into their role as a mid-level leader and how they can leverage their structural positions to move the organization towards greater strategic alignment.
- **Analyze** team-level OKRs against business unit-level OKRs to ensure alignment and coherence.
 - Participants will learn how to evaluate and compare their team's OKRs

- with the larger strategic goals of the business unit, identifying areas of alignment and potential gaps.
- **Conduct** a SWOT analysis to identify and analyze strengths and weaknesses at both team and organizational levels.
 - Participants will learn the process and techniques for conducting a SWOT analysis, enabling them to identify the internal strengths and weaknesses within their team and the broader organization.
 - They will develop the ability to critically assess and prioritize these factors to inform strategic decision-making.

Audience Needs:

- Participants will need their current team's OKRs and business unit's OKRs/Strategy. Directions to bring these materials is noted at the end of the pre-work.
 - If participants were unable to obtain their business unit's OKRs/Strategy (department OKRs/Strategy), they can still complete the activity. **All participants are required to bring their team's goals for the current year as a minimum requirement.** The purpose of this exercise is to reflect on how strategy cascades down through an organization and how developing strategic plans that are in service of one another within that system help the organization to achieve its mission and vision.
 - [Materials Packet](#) for facilitator reference. ***Participants should use their learning journals to complete this activity.***

What to Expect for Delivery:

- Example Time Block:
 - 9am - 12pm
- 2 hours and 55 hours

What do you hope to gain by taking this course?



Time: *As participants are entering*

Purpose: Use to gauge what participants are hoping to gain by taking this course

Activity: Jamboard

Facilitator Action:

DO:

- Launch [Jamboard](#) and share in the chat with participants as they are entering the meeting.
- **Question:** What do you hope to gain by taking this course?
 - Encourage them to interact with one another's responses if they finish early (+1, add on, questions, etc.)
- Support the discussion by displaying the Jamboard
 - Highlight what will be covered, what could be considered in the future, and how they can further develop this skill on their skills (leveraging LinkedIn Learning, MindTools Leadership Hub, etc.)
 - Use this slide as a *Parking Lot*; encourage participants to post questions and revisit at the end of class.

Resources:

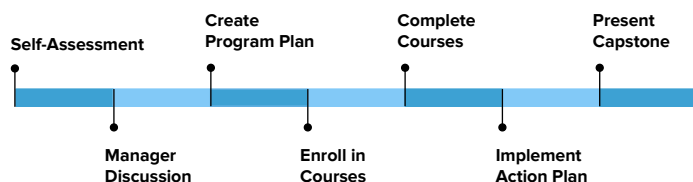
- [Launch Jamboard](#) - What do you hope to gain by taking this course?

Before We Begin



- **Download** or **Open** your Learning Journal
- **Review** the Capstone and Process Overview

What questions can I answer?



ASCEND

LEAD

Time: 15 minutes

Purpose: Conduct a brief CFU to ensure participants have the materials they need to be successful during this program (*modified directions included for the Pilot*)

Activity: Discussion

Facilitator Action:

- **Share the Learning Journal:**
 - PDF view only copy
 - Download to your computer
 - Save for the entire program
 - **Open with Adobe Reader and NOT Google Chrome**
 - **If you open with Google Chrome, it will not automatically save. Your best option to save is to open it with Adobe Reader since this is an interactive PDF.**
 - https://drive.google.com/file/d/14Hy1hwyK4vkvFOO56iBAL61bZ8j_XKOJ/view?usp=sharing

SAY (*Modified for the Pilot*):

- Before we begin, I wanted to take a few moments to review the program overview and answer any questions that you may have.
 - Before today's session, all of you should have already:
 - Received an email from Lead@Dish.com with the pre-work for today's training.

ASK:

- Did any of you **not** receive the eLearning prework?

SAY:

- I'm now going to share the program Learning Journal with you. This Learning Journal is designed to be a user-manual and will ensure your success throughout the program. *This Learning Journal is a downloadable PDF with fillable sections, drop down menus, and checkboxes - you can complete everything directly in the PDF and save it to your Drive. (Pages 4 and 5 currently)*
- Since this is a pilot, I'm going to walk you through each component of the program step by step.
- Ascend 2 was designed to give you the freedom to curate your own learning pathway based on your areas of greatest need. For this pilot, you all signed up for the courses that you were interested in/or able to attend. So, we're doing things slightly different. I want to take a moment to discuss those key distinctions so you know what's expected of you and how this program will run in the future.
 - You will receive your Learning Journal today. This Learning Journal is designed to walk participants through the program in order, without the support of a facilitator. Since this is the pilot, we'll be doing things slightly out of order.
 - The Self-Assessment is designed to help participants identify their areas of strength and opportunity. In the future, participants will use this self-assessment, along with a conversation with their manager, to determine their course selections. For the pilot, that's not necessary since your courses have already been selected. However, I'd still like you to take the assessment and have a conversation with your manager. This will help you recognize where to focus your attention.
 - You do not need to enroll in these courses through SuccessFactors. All of the vILT have been scheduled and you should have received a calendar invite from me (or Katie Benik). For all instructor-led trainings, you will receive the pre-work 2 weeks prior via email. Please ensure that you are completing them in advance as they are vital to your success in the courses.
 - After each course, you will need to complete a post-class reflection in your Learning Journal.
 - At the end of the program, you will identify 1 of these reflections to turn into an action plan, which you will implement and present on during your capstone presentation.
 - In order to be eligible for the capstone presentation, you must complete a total of 6 courses (with a minimum of 3 virtual instructor-led trainings).

ASK:

- What questions can I answer?

Resource:

- Learning Journal
 - https://drive.google.com/file/d/14Hy1hwyK4vkvFOO56iBAL61bZ8j_XKOJ/view?usp=sharing
-
-
-

SAY:

- Before we begin, I wanted to take a few moments to review the program overview and answer any questions that you may have.
 - Before today's session, all of you should have already:
 - Enrolled in the program through SuccessFactors
 - Received a copy of the Learning Journal from Lead@Dish.com
 - Note: *This Learning Journal is a downloadable PDF with fillable sections, drop down menus, and checkboxes - you can complete everything directly in the PDF and save it to your Drive.*
 - Taken the Self-Assessment
 - Had a discussion with your manager to determine your program pathway
 - Enrolled the courses you self-selected
 - This program is designed to give you the freedom to curate your own learning pathway based on your areas of greatest need. As a result, you may not have the same facilitator to answer questions or help guide you through the program.
 - The Learning Journal is designed to be a user-manual and will ensure your success. That being said, we know questions may still come up.

ASK:

- Did any of you not complete the steps I mentioned?
- What questions do you have about program logistics?
- What questions do you have about the Learning Journal?

Resource:

- Learning Journal:
https://drive.google.com/file/d/14Hy1hwyK4vkvFOO56iBAL61bZ8j_XKOJ/view?usp=sharing

Today, you will learn how to:

1. **Develop** an understanding of the strategic framework at DISH
2. **Recognize** your role as a mid-level leader in strategy development
3. **Analyze** team-level OKRs against your department's OKRs
4. **Conduct** a SWOT analysis to identify strengths and weaknesses



ASCEND

LEAD

Time: 2 minutes

Purpose: Review the agenda for this training

Activity: Lecture / Overview

Facilitator Action:

SAY:

- (Optional) Learning Objectives - by the end of this session, you should be able to:
 - Identify the strategic framework and DISH and how it informs strategy development and implementation
 - Recognize how your structural position within the organization (as a mid-level leader) puts you in a unique position to move the organization towards greater strategic alignment and improved outcomes.
 - Analyze your team's OKRs against your department's OKRs to reflect on strategic alignment, identify gaps, and inform future strategy.
 - Conduct a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) to identify and the strengths and weaknesses within your team and organization.

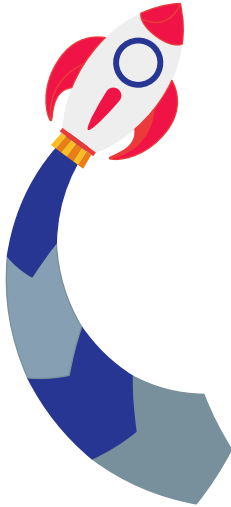


ASCEND

Introduction

LEAD

The Relationship Between OKRs & Strategy



Strategy

Strategy is the **what**.

Strategy involves determining the intended direction for the organization. It's leadership's responsibility to point the organization towards the desired intent, not dictate a plan.

OKRs

OKRs are the **how**.

When leadership sets the strategic course, the teams then determine the best plan to execute the strategy.

OKRs are a way to translate strategy into actionable and measurable goals.

ASCEND

LEAD

Time: 5 minutes

Purpose: Discuss the relationship between OKRs and Strategy

Activity: Lecture

- **Facilitator Note:** *Mid-Level leaders are responsible for translating high-level strategy (set by executive leadership), developing strategic plans (OKRs), and developing strategic thinking - the purpose of this course is to discuss the levels of strategy (how strategy is set at the top of the organization and how that cascades down to mid-level leaders who are then responsible for setting strategic plans). In other words, this course covers both the 30,000 foot view of strategy and strategic planning to support mid-level leaders in strategy planning and removing roadblocks present at DISH.*

Facilitator Action:

SAY:

- Before we begin, I want to briefly discuss the relationship between OKRs and Strategy.
- This course focuses on the Manager Commitment, "Set Clear Strategy and Goals" - that includes translating high level strategy, guiding future strategy, and developing strategic plans (OKRs).
- During this course, we will discuss OKRs (or 'Strategic Plans') and Strategy, as they relate to your role as a mid-level leader.
 - Before we dive in, let's discuss what we mean when we say **Strategy** and **OKRs**:

- **Strategy is the What.** Strategy involves determining the intended direction for the organization. It's (executive) leadership's responsibility to point the organization towards the desired intent, not dictate a plan.
- "Strategy is essentially an intent, rather than a plan." – [Steven Bungay](#), author of "The Art of Action" and leader in Strategy consultation for Leadership.
 - In other words, Bungay suggests that Strategy is the leadership team identifying where the company should focus for the next period of time.
- **OKRs are the How.** When leadership sets the strategic course, the teams then determine the best plan to execute the strategy.
- OKRs are a way to translate strategy into actionable and measurable goals.

ASK:

- Are there any questions?

Resources:

- Article: [Why OKRs are no substitute for a company strategy](#)
- Article: [The relationship between OKRs and Strategy](#)



Set Clear Strategy and Goals

Know what we need to deliver
and why it matters to our customers and our company.
Have total commitment to reach our goals.

Time: 5 minutes

Purpose: Review what the manager commitment definition means to them

Activity: Jamboard

Facilitator Action:

SAY:

- The Manager Commitment “Set Clear Strategy and Goals” is defined as “Knowing what we need to deliver and why it matters to our customers and our company. It’s having a total commitment to reach our goals.”

ASK:

- What does this definition mean to you at your level of leadership?
- What does it look like?

DO:

- Share [Jamboard link](#) and ask participants to write their answers to the question on slide 1.
- Give **2 minutes** for participants to answer
- Circle/group by themes that appear (**3 minutes**)
 - Emphasize themes around:
 - *OKR alignment with corporate/business unit strategy*
 - *future-focused strategy*
 - *the struggle of the mid-level leader within the strategic*

■ *framework*

SAY:

- I'd love to continue this discussion in pairs by diving deeper into the behaviors.
- Many of you have reviewed the "Guide to Your Success at DISH" which includes behavioral indicators to define performance in an actionable, observable way.
 - In other words, these behaviors define exactly what success looks like at your level for this particular Manager Commitment.
- *Transition to the following slide to display the behaviors and begin pair-share activity.*

Resource:

- [Jamboard Link](#)
 - *Also accessible in the Public Drive*

What does this look like?



A leader who demonstrates strategic thinking:

- 1 Develops strategic plans for long-term team potential
- 2 Guides future strategy based on expertise and emerging trends
- 3 Translates high-level strategies into actionable goals and OKRs
- 4 Creates strategies to enhance operational performance
- 5 Considers ways to implement strategy and manage changes

ASCEND

LEAD

Time: 30 minutes

Purpose: Dive deeper into the behaviors + reflect on current performance

Activity: Pair-Share

Facilitator Action:

SAY: (3 minutes)

- **A leader who demonstrates strategic thinking:**
 - Develops strategic plans for long-term team potential
 - Guides future strategy based on expertise and emerging trends
 - Translates high-level strategies into actionable goals and OKRs
 - Devises strategies to enhance operational performance
 - Considers ways to implement strategy and manage changes
- As you identified in your pre-work, leaders often mistake the creation of tasks, activities, or goals *as strategy*.
- It must involve a cohesive long-term plan that provides clear direction and encompasses a broader perspective.
- I'm going to put you into breakout groups with a partner for **15 minutes**.
- With your partner, use the behaviors and discussion questions on this [slidedeck](#) (*share with participants*) to reflect on your performance and consider areas of opportunity.

DO:

- Send participants into breakout rooms in pairs for **15 minutes**.
- After 15 minutes, bring participants back for a whole group debrief.

ASK: (12 minutes)

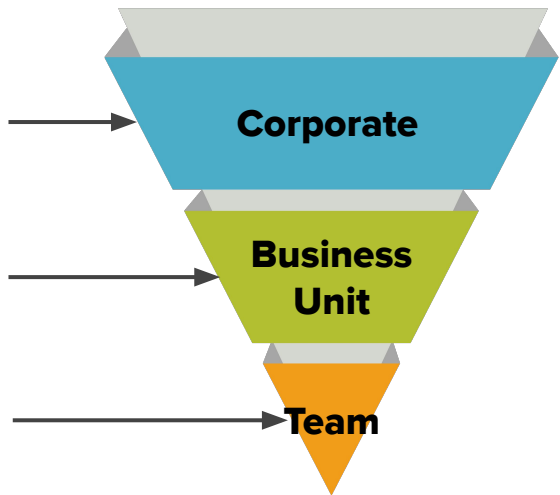
Facilitator Note: *The goal of asking these questions is to get participants thinking about their relationship with strategy and strategic plans. For the purpose of this conversation, you are not striving towards a specific answer, but rather encouraging a dialogue around these behaviors.*

- **How do you set strategic goals for your team? Do you have a process?**
- How do you ensure that your strategic plans/OKRs align with strategy set at a higher level?
 - With the overall vision and mission?
- **How do you evaluate the progress and effectiveness of your strategic plans/OKRs?**
 - Have you ever had to pivot or adjust the strategic direction? What factors influenced that decision?
- **Of these, what do you do well? Where do you want to improve?**
 - Are there barriers to your success as it relates to strategy?

Resources:

- [Participant Slidedeck](#) - Behaviors + Discussion Questions

The Three Levels of Strategy



ASCEND

LEAD

Time: 5 minutes

Purpose: Share high level overview of *The Three Levels of Strategy* that exist at any large organization

Activity: Lecture

Facilitator Action:

SAY:

- (Transition from the behaviors):
 - **We know what it looks like when a leader demonstrates strategic thinking, now let's take a look at the three levels of strategy to understand how strategy cascades down within an organization.**
- To achieve success in the marketplace, organizations must take advantage of opportunities while anticipating and preparing for the future across all levels.
 - This includes the development of an overarching corporate strategy that aligns with the organization's vision and mission.
 - Each business unit within the organization then has it's own business unit strategy, which its leaders use to determine how they will compete in their individual markets or succeed in their department/sector.
 - In turn, each team should have it's own strategy to ensure that its day-to-day operations move the organization in the right direction.
- At each level, a simple definition of strategy can be: "Determining how we are going to win in the period ahead".

For facilitator reference:

Corporate Strategy:

- Focuses on enhancing value of business units collectively
- Focuses on developing strong relations between business units
- Establishes shared technologies and resources
- Raises capital and develops a strong corporate brand
- Considers organizational design for competitive advantage and strategic goals

Business Unit Strategy:

- Focuses on successful competition in individual markets
 - a. **Note:** *This may look different across the business; not always about markets. At DISH, we have vertical and horizontal organizations. Vertical organizations are revenue generating organizations (Sling, Boost, Dish TV); horizontal organizations are support organizations (CXO, IHS, Finance Legal, HR).* [Reference Image](#)
- Linked to objectives identified in the corporate level strategy
- Can involve competitive analysis
- Utilizes core competencies (observable/measurable skills & capabilities) to meet customer needs effectively
- Explores opportunities for creating and capitalizing on new ventures
- Enhances productivity and motivation when employees understand how they contribute to the unit's success

Team Strategy:

- Each team requires its own team-level strategy that supports the overall business unit strategies, and therefore corporate strategies
- Each team has a different contribution to make, meaning that each team needs to have its own team-level strategy
 - a. *For this reason, it's also important that the team's purpose is clearly defined*

Resource:

- [MindTools Article: What is Strategy?](#)

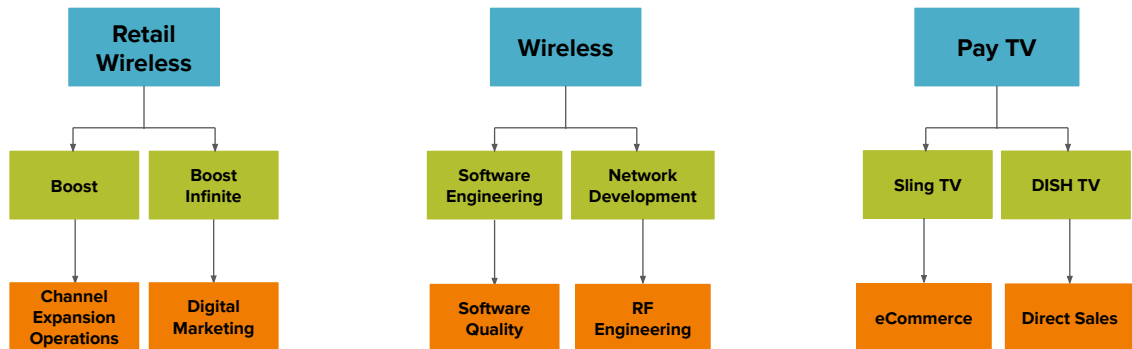


ASCEND

**The Role of
Mid-Level Leaders**

LEAD

Strategy at DISH



ASCEND

LEAD

Time: 10 minutes

Purpose: Provide context for how strategy is cascaded down through the three levels at DISH; Begin discussion on how this structure affects mid-level leaders.

Activity: Lecture, Discussion

Facilitator Action:

SAY:

- This organizational structure is not comprehensive, but it represents some of the teams that support the different lines of business here at DISH. As mid-level leaders, many of you manage teams like the examples displayed here in orange (or similar teams that serve similar functions). We're going to use this as a reference to frame a conversation around the three levels of strategy here at DISH.
- LSA Global published an article titled "[The Underappreciated Role of Middle Managers in Strategy Implementation](#)". In summary, the article highlights how mid-level leaders play a crucial role as the key link between executives and employees. They have the responsibility of converting high-level strategic plans into practical daily decisions and actions. They're responsible for the implementation, gaining the buy-in of their teams, and ensuring that the goals and activities to achieve the strategy are executed.
 - **Yet their research showed that there is a big disconnect between the top level of leadership and employees. Employees that were surveyed perceived the organizational strategy as 50% less clear**

- **than their leaders believed it was.**

ASK:

- Why do you think that is? Do you see this disconnect showing up at DISH?
 - **Communication breakdown:** Top-level executives may not effectively communicate the strategy to mid-level leaders, who, in turn, struggle to convey the strategy to their teams. This breakdown in communication can result in a lack of clarity and understanding among employees responsible for executing goals (converting the strategy set at the top into actionable OKRs).
 - **Lack of alignment:** There might be a misalignment between the strategy set by top-level leaders and the daily operations carried out by mid-level leaders and employees. If the strategy is not effectively cascaded down to all levels of the organization, employees may not see how their individual tasks contribute to the overall strategic objectives.
 - **Complex or ambiguous strategy:** The strategy itself may be complex or formulated in a way that is difficult for employees to grasp. If the strategy is not communicated in a clear and concise manner, employees may struggle to understand the intended direction and goals of the organization.

Resource:

- [The Underappreciated Role of Middle Managers in Strategy Implementation](#)
- [Balanced Scorecard Institute - The Role of Middle Managers in Strategy Thinking/Implementation](#)
- [A Middle Management Perspective on Strategy Implementation - International Journal of Business and Management](#)

The Role of Mid-Level Leaders



“The role of the middle manager here is to do the **translation** on behalf of the executive and generate the need for the strategy.”



“Middle managers are in a **better position** than executive management to convey information throughout the organization ... as they can help with the **downward flow** of information and the **horizontal alignment** between the enterprise functional areas.”



ASCEND

LEAD

Time: 5 minutes

Purpose: Provide context for breakout session (next slide): *Mid-level leaders play a key role in the strategic process due to their structural positions, though that often comes with unique challenges.*

Activity: Lecture

Facilitator Action:

SAY: (Note: *This discussion is a continuation from the previous slide and should transition naturally.*)

- These quotes were pulled from the International Journal of Business Management. The study was examining the ‘Middle Management Perspective on Strategy Implementation’ and concluded that mid-level leaders not only play a crucial role in the implementation of organizational strategies, but they also face many challenges in strategy implementation.
 - As you read in your pre-work, mid-level leaders are often referred to as the **torch-carriers**, sometimes even the “**frozen group**” as you see here in this image.
 - Due to their structural positions, mid-level leaders play a key role in managing resources, providing information to decision makers, and communicating the strategic intent of senior management throughout the organization. However, that information isn’t always communicated throughout the system flawlessly.
 - Take **2 minutes to independently read the quotes on the slide** and

- reflect on your personal experience as a mid-level leader.
- *Let participants know that they will be doing a group reflection when they are done.*

Resource:

- [The Underappreciated Role of Middle Managers in Strategy Implementation](#)
- [Balanced Scorecard Institute - The Role of Middle Managers in Strategy Thinking/Implementation](#)
- [A Middle Management Perspective on Strategy Implementation - International Journal of Business and Management](#)

Group Reflection



What needs to **change**?



ASCEND

LEAD

Time: 20 minutes

Purpose: Discuss challenges mid-level leaders face in strategy implementation (Group Discussion)

Activity: Lecture + Discussion

Facilitator Action:

SAY:

- In breakout groups, you're going to have 10 minutes to discuss your reflections from the previous slide and answer the question displayed here.
- The goal of this discussion is to get you all thinking about **solutions**:
 - **What needs to change? What do you need to effectively execute the strategic plans you set for your team?**
- There is no Jamboard for this session. Please spend the last 2 minutes with your group identifying a key takeaway you'd like to share with the larger group.

DO:

- Send participants into breakout group sessions of 3-5 people to encourage an enriching discussion. *Try to mix up the groups so that participants are able to hear from other leaders from across the business.*
- Circulate during group sessions.
 - After 10 minutes, bring participants back for a debrief.

ASK (10 minutes):

- **What needs to change for mid-level leaders to effectively lead strategy implementation?**
- What stood out to you most during these discussions?
 - Did anything surprise you?

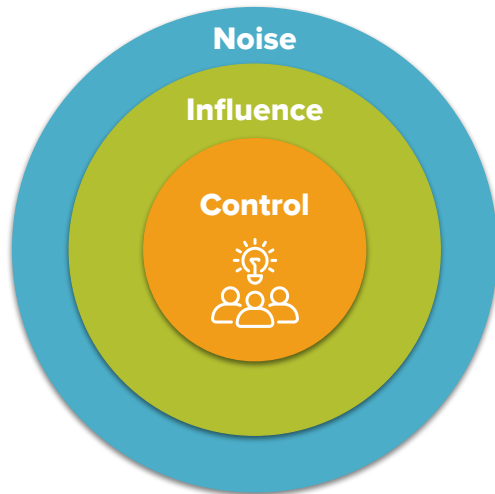
SAY:

- Consider what is within your control, what is not within your control.
 - *Give participants a moment to reflect before transitioning to the next slide.*

Resource:

- [The Underappreciated Role of Middle Managers in Strategy Implementation](#)
- [Balanced Scorecard Institute - The Role of Middle Managers in Strategy Thinking/Implementation](#)
- [A Middle Management Perspective on Strategy Implementation - International Journal of Business and Management](#)

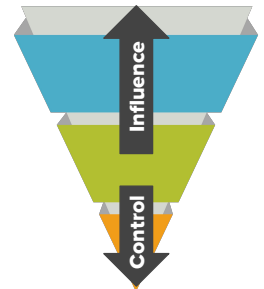
Recognizing Your Sphere of Control



Your **Sphere of Control** includes the projects, resources, and decisions that you can directly manage, shape, and impact.

Your **Sphere of Influence** refers to your ability to impact others' decisions and actions, even without direct control.

Your **Sphere of Noise** is where you have no control or influence.



ASCEND

LEAD

Time: 10 minutes

Purpose: Recognize sphere of control as a mid-level leader - *The purpose of the previous three slides was to recognize that mid-level leaders are in a challenging, yet important position when it comes to strategy development and implementation. The goal of this slide is for them to recognize where to focus their energy so that they can make meaningful contributions.*

Activity: Lecture + Discussion

Facilitator Action:

SAY:

- One of the biggest challenges mid-level leaders face with strategy implementation is the dual responsibility of pulling information down from the top (*often in the absence of critical details or timelines*) and cascading it down to their teams.
- As a mid-level leader, you play a crucial role in strategy implementation. You're the bridge between top-level leaders and employees. You're responsible for translating high-level strategic objectives into actionable plans by aligning your team with the overall strategy, ensuring that goals and targets are understood and executed effectively.
- But as we just identified, strategic plans are set at three different levels. To effectively determine priorities, you must ensure alignment with both Business Unit and Corporate strategy, encompassing long-term goals.
 - **ASK:** So, if you're lacking crucial information while formulating

- **strategic plans for your team, what actions should you take?**
 - Focus on your **'Sphere of Control and Influence'**
 - The sphere of control refers to the specific areas, responsibilities, and decisions that a person or a group has direct authority and influence over within an organization.
 - **The sphere of control encompasses the tasks, projects, resources, and decisions that you can directly manage, shape, and impact. Smallest circle, but it's where you should spend most of your time!**
 - *Ex. Translating strategic objectives into actionable plans for your team, monitoring progress towards strategic objectives, ensuring that goals and targets are understood and executed effectively.*
 - **The sphere of influence refers to the extent to which a person can affect or shape the decisions, actions, and outcomes of others, even without direct authority or control over them.**
 - *Ex. You are waiting on the larger business unit to set strategy so that you can set strategy for your team in the quarter ahead. Provide that feedback, advocate for the information your team needs to be successful.*
 - **ASK: Tell me about a time when you influenced the strategy that was set above you?**
 - **The sphere of noise may cover a broad range of topics which a person has an interest in, but has no control or influence over. Leaders spend a lot of time here!**
 - *Ex. How the mission and vision of DISH influence strategy implementation.*

ASK:

- As mid-level leaders, what's within your sphere of control? Influence?
 - How can you leverage that understanding (*knowing what's within each sphere*) to drive organizational success and implement strategic initiatives?



BREAK

LEAD

Time: 5 minutes (move as needed)

The logo for ASCEND, featuring a stylized blue icon of three horizontal bars of increasing height to the left of the word "ASCEND" in a bold, black, sans-serif font.

ASCEND

**Strategic Planning
Reflection**

The logo for LEAD, featuring the word "LEAD" in a bold, black, sans-serif font, with a small blue icon of three horizontal bars of increasing height positioned between the "L" and "A".

LEAD



Independently Reflect on your team's OKRs

Time: 20 minutes (5 minute set up; 15 minutes for independent activity)

Purpose: Participants independently reflect on the connection between their current OKRs and organizational strategy

Activity: Independent Activity

Facilitator Action:

SAY:

- Today's activity will be an independent activity followed by a pair-share (following slide).
 - You will have 15 minutes to independently work on this activity, after which you will share your reflections with a peer in a breakout room.

DO:

- Give participants a high level overview of the activity. All materials will include further directions.
- To ensure success for this independent activity, use this [facilitator link](#) to show participants what to do.
- All materials are also included in their Learning Journal.
 - Share your screen
 - **Review the materials needed:** Your department's OKRs/Strategy (some organizations may cascade down goals or strategic plans - they should insert the appropriate term), and their team's OKRs
 - (5 min) **Review the corporate strategy activity:** The purpose of this activity is for them to make connections between their team's OKRs and

- the mission and vision.
- (10 min) **Review the reflection activity:** The purpose of this activity is for participants to reflect of the connection between their team's OKRs and their department's OKRs/Strategy.

DO:

- *The time markers on each page are intended to support participants in managing their time.*
- *Give participants the freedom to turn their cameras off (or any other accommodations that would support them during this activity).*
- *Let participants know that they will return after **15 minutes** to share their reflections with a partner.*
- **Start 15 minute timer to begin activity.**
- **Goal:** Reflect on your current team's OKRs and how they support strategy at higher levels in the organization (Business Unit, Corporate: Mission/Vision)
- **Materials Needed:** Your current department's (Business Unit) OKRs/Strategy, Your current team's OKRs, materials (in participant's learning journal) - [Force Copy Link](#) for those that are having difficulty accessing it through their learning journals.
- **Note:** Facilitators will need to navigate to the following slide (**Slide 17**) to display the breakout session questions and view facilitator logistics.

Activity: Pair-Share 1



Discussion Questions

1. What **gaps** did you notice with your current OKRs?
2. How will this reflection **inform** how you move forward?



ASCEND

LEAD

Time: 15 minutes (10 minutes for breakout session, 5 minutes for debrief)

Purpose: Participants discuss their reflections from the OKR activity in pairs

Activity: Pair-Share

Facilitator Action:

SAY:

- I'm going to put you in breakout rooms with a peer to reflect on the activity you just completed.
- The goal of this activity is for you to share your reflections with a peer and discuss how you will use these reflections to inform strategy development in the future.
- You do not need to complete anything during this activity.
- When you return from your breakout session, we'll discuss your reflections as a group.
 - Use this as an opportunity to learn from one another!

DO:

- Send participants into breakout groups in pairs. They will return to these same pairings for the second reflection (following the next activity).
- Tell participants they will have **10 minutes** to answer the discussion questions above with their partner using this [slidedeck](#) as a reference (*share link with participants*).

ASK:

- In your breakout rooms, consider the following:
 - What gaps did you notice with your current OKRs?
 - How will this reflection inform how you move forward?

DO:

- When participants return from breakout sessions, ask each pair to share their takeaways **whole group**.

Resources:

- **Slideck Link for participants:**
<https://docs.google.com/presentation/d/13dWUffv5FhxKwhDumJbWAERKaM8r6QVxWwXAsTrYYMY/edit?usp=sharing>



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**Developing
Strategic Plans**

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Developing Strategic Plans



The Three Stage Process to Strategic Planning:

1	Analyzing the context in which you're operating
2	Identifying strategic options
3	Evaluating and selecting the best options

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Time: 5 minutes

Purpose: Introduce the Three Stage Process to Strategic Planning

Activity: Lecture

Facilitator Action:

SAY:

- “How are we going to win in the period ahead?” is frequently asked when developing strategic plans. This question helps to translate the organization’s **vision** into an **actionable plan**.
- Depending on the scope, you may want to develop strategies to:
 - Increase profitability
 - Gain market share
 - Boost customer satisfaction
 - Complete a project under budget
- In order to formulate your strategic plans, it is crucial to have a comprehensive understanding of the internal and external factors that impact you.
- By identifying and analyzing these factors, you can make well-informed decisions and successfully execute your strategy.
- *That’s why analyzing the context in which you’re operating is so important.*
- Today we’re only going to focus on stage 1.
- **Stage 1: Analyzing Your Context and Environment**
 - **The goal of this stage is to conduct a comprehensive analysis of your team, your environment, your customers and stakeholders. By**

- **thoroughly examining these factors, you will gain valuable insights that will inform the development of your strategic plans and increase your chances of achieving success.**
- A SWOT is a valuable tool to support leaders in uncovering what they do well and where they have weaknesses.
- **SWOT** stands for: **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats
- If done well, a SWOT can reveal an organization's (or team's) strengths and weaknesses.

ASK:

- Have you used a SWOT analysis before? In strategy development?
 - How did it benefit you?

For reference:

Stage 2: The goal of Stage 2 is to identify strategic options that can provide a clear advantage and help the organization or team achieve its objectives. It involves several activities like brainstorming options, examining opportunities, and solving problems.

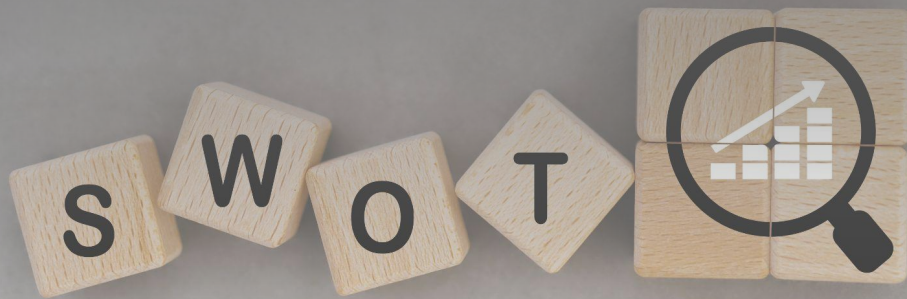
Stage 3: The goal of this stage is to evaluate, select strategic options, and finalize the strategic plans. By the end of this stage, you should be choosing the best way forward with your evaluation complete, making sure that you don't choose too many options and spread your resources too thin. This is an opportunity to go back to the top and check your strategic plans against the organization's vision, mission, and values to ensure you are delivering and aligned with those above you.

Resource:

- [MindTools: Developing Your Strategy](#)



Uncover your team's strengths and weaknesses



Time: 20 minutes (5 minutes set up; 15 minutes for independent activity)

Purpose: Participants independently complete a SWOT analysis to improve their strategic thinking/planning skills

Activity: Independent Activity

Facilitator Action:

SAY:

- You will have 15 minutes to complete this activity, and will then return to the *same breakout room* to share your observations with your partner.
- Even if you've done a SWOT analysis before, one of the benefits of completing this activity is learning from one another and sharing what you've uncovered - so I urge you to lean into both the activity and the discussion to maximize what you take away.

DO:

- Give participants a high level overview of the activity. Participants will return to their learning journals to complete the SWOT analysis (template included).
- To ensure success for this independent activity, use this [facilitator link](#) to show participants what to do.
- **All materials are also included in their Learning Journal.**
 - Share your screen
 - **Review the activity overview:** Explain to participants that the purpose of a SWOT analysis is for them to analyze the context in which their team

- is operating to inform strategic planning in the future.
 - Explain that they will be analyzing **internal factors** for *strengths and weaknesses* and **external factors** for *opportunities and threats*
 - Read the included examples to provide context. Ask participants if they can think of any additional examples.
- **Review the SWOT analysis template:** Explain to participants that they will be using this template to complete the SWOT analysis by answering the questions within each quadrant.

DO:

- *Give participants the freedom to turn their cameras off (or any other accommodations that would support them during this activity).*
- *Let participants know that they will return after **15 minutes** to share their reflections with **the same partner**.*
- **Start 15 minute timer to begin activity.**
- **Goal:** Complete a SWOT analysis to reveal your team's (and organization's) strengths and weaknesses.
- **Materials Needed:** Materials (in participants learning journal)
- **Note:** Facilitators will need to navigate to **Slide 19** to display the breakout session questions and view facilitator logistics.

Resource:

- [MindTools: What is a SWOT analysis?](#)

Activity: Pair-Share 2



Discussion Questions

1. How will you use this SWOT analysis to **identify** the strategic options on your team?
2. What **additional steps** will you take in strategic planning?



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Time: 15 minutes (10 minutes for breakout session, 5 minutes for debrief)

Purpose: Participants discuss their reflections from the SWOT activity in pairs

Activity: Discussion

Facilitator Action:

SAY:

- I'm going to put you back in breakout rooms with your same partner to reflect on the activity you just completed.
- You will be using the same slidedeck (Slide 2) to reference the discussion questions on the screen with your partner.
- When you return from your breakout sessions, we'll discuss your reflections as a group.

DO:

- Put participants back into breakout rooms, returning to their same pairings.
- Tell participants they will have **10 minutes** to answer the discussion questions above with their partner using the same [direction slides](#).

ASK:

- In your breakout rooms, consider the following:
 - How will you use this SWOT analysis to identify the strategic options on your team?
 - What additional steps will you take in strategic planning?

DO:

- When participants return from breakout sessions, ask each pair to share their takeaways **whole group**.

Resource:

- [MindTools: What is a SWOT analysis?](#)

Key Takeaways



- What final reflections do you have from today that you'd like to share?
- What will you take away from this session?
- How will you put your learning into action?



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Time: 5 minutes

Purpose: Wrap up session with key takeaways

Activity: Discussion

Facilitator Action:

SAY:

- Before we end for the day, I'd like to take a few minutes to share key takeaways and answer any questions that you might have.

ASK:

- What final reflections do you have from today that you'd like to share?
 - What will you take away from this session?
 - How will you put your learning into action?
- Do you have any questions that I can answer before we end for the day?

Additional Resources to Share:

- Article: [Why OKRs are no substitute for a company strategy](#)
- Article: [The relationship between OKRs and Strategy](#)
- [Steven Bungay](#)'s website - author of "The Art of Action" and leader in Strategy consultation for Leadership
- **MindTools:** Platform that has thousands of resources for leaders to help you build your skills and capabilities.
 - [MindTools Article: What is Strategy?](#)

- [MindTools: Developing Your Strategy](#)
- [MindTools: What is a SWOT analysis?](#)

Thank You!

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