



# Five Good Lessons on Strategy

REBECCA PETZEL | JANUARY 4, 2012

As we [mentioned a few months back](#), this past Fall, Groupaya engaged in our first strategic planning process. Given our obsession with learning, it should come as no surprise that this process helped evolve both our thinking about who we are and what makes good strategy work.

For me personally, it was particularly interesting stepping in to the facilitative role for my two mentors, Eugene and Kristin, while also participating as a valued stakeholder in the planning process. Seeing as one of our [goals for 2012](#) is to share learning aggressively, I'd like to post a few things I am taking from the experience.

## 1. The gift of space

Eugene and Kristin are both strategic thinkers. They did not start Groupaya blindly. However amidst all the craziness of a start-up (balancing client work, setting up operations, etc.), they were not setting aside time to concretely articulate Groupaya's mission, vision, strategies, and goals.

So this Fall, we started an experiment where I became Groupaya's strategy consultant. Eugene and Kristin did not need my assistance to tell them what makes good strategy and how. They needed someone accountable for holding and creating the space to activate the team around higher level strategic questions. It was a timely reminder that sometimes the greatest gift a good consultant or experience designer can offer is the gift of space.

## 2. Don't underestimate conversation

As important as space is, my intention for the strategy process was to concretely articulate our vision, mission, values, strategies, roadmap, and operating principles. Rather than try to accomplish all of this in a few marathon sessions, we chose a process that was more realistic for our small and taxed team, breaking the work into six smaller meetings over a three month period.

The benefit of this approach was that it emphasized iteration. An unintended side effect was that I sometimes got visibly anxious when one of our three-hour sessions was clearly not going to result in the outcome I'd designed towards. In one particularly tense moment, Eugene turned to me and said "Rebecca, I know we are not going to finish the roadmap as you planned, but this conversation is important, and we need to have it. This is what needs to happen."

And of course, he was right. In the months since those intense strategy conversations, I have seen the benefits of those complex conversations unfold. This is the advantage of being a strategy consultant who sticks around to complete the work: You can see what work has the greatest impact. And in the end, those tough conversations that sent us off schedule also ended up having had the greatest impact on our work.

## 3. The power of shared artifacts

The advantage of doing the work in a longer, iterative process is that it allows time to sit with the results, think through their implications, and integrate your learning before making related decisions. A disadvantage is that your team can get lost in the process. I've seen teams get lost and uncomfortable in two-day strategy meetings, so you can imagine the challenge with a three-month process.

Our extended process helped illuminate the necessity of good shared artifacts in group process — artifacts that remind you of the important conversations you had, emotions evoked, and decisions made and that help move conversations forward. In particular, your team will get lost in an extended process without a shared roadmap indicating where you are in the process and how all the work is interrelated.

It was a great reminder that no matter what your strategy process looks like, you can never pay too much attention to creating clear roadmaps and artifacts that track the progress of your work collectively.

#### **4. Talking about language is annoying, but important**

One of the toughest times in any strategy process (for me) is working through the different mental models around strategy. Do we need a vision, mission, and values? Or vision, purpose, and principles? What is the difference between a vision and a mission? How are values part of a strategy? What's the difference between a mission and a goal?

Working through these unspoken assumptions is frankly my least enjoyable part of the work. That said, I'm a bit obsessed with having these conversations early and often, especially as you make your strategy thinking more of an inclusive and activating process (as opposed to a roadmapping exercise for leadership alone). Simply having the conversations can shift the team in to a strategic mindset, get people thinking hard about why we do what we do, bring more intentionality to the work, and ultimately build your capacity to do this work collectively.

So if you, like me, are a little tired of saying, "Well, what is a good mission anyway?", my advice is to persevere and lean into these uncomfortable conversations sooner rather than later, as it will help align and unleash the potential of your team. And, of course, remember point three around shared artifacts: A clear artifact outlining the relationship between the different components of a strategy will make the conversation far more effective.

#### **5. The importance of good goals**

In Groupaya's process, these language conversations were most tense and most powerful when we were norming around how to frame our goals. Both Kristin and Eugene wrote interesting blog posts on the topic of good goals ([here](#) and [here](#)) as a result of this work. I'll just take this opportunity to re-articulate that you can not underestimate the power of good goals. If this is all that you achieve out of your next strategy process, you've hit gold.

That's it for now. I can't resist ending my first post of 2012 with wishes for a learningful new year, and sharing my commitment to continue to share tidbits with my colleagues here at Groupaya.

Till then,

