



Strategic Alignment

Leadership Offsite

Case Studies



Establishing a New Leadership Team and Team Culture

Strategic Alignment Offsite

Establishing a New Leadership Team and Team Culture



The Challenge

The newly appointed president of a large division within a medical diagnostics and testing company faced the challenge of uniting a fragmented leadership team.

The team comprised experienced long-time insiders, who were skeptical of the new leadership, and a few new hires unfamiliar with the company's culture. The president aimed to create a cohesive and consistent culture, blending what had worked well historically with new strategic directions.

Additionally, he needed to establish clear strategic objectives and align the team around these goals. The offsite aimed to build alignment, understanding, and ideation around both cultural and strategic priorities, involving approximately 15 leaders and extended team members.



The Approach

Before the Event:

Our Deliberate Team conducted a comprehensive survey across the organization to understand attitudes and beliefs regarding the company vision, communication, and strategic focus. We followed up the survey with a series of by one-on-one interviews with key leaders to gain deeper insights, identify personal pain points and concerns as well as to establish trust and build rapport in advance of the session.

The Offsite:

The Miami offsite spanned one and a half days, starting with a mini-keynote talk about change and a set of energizers to build trust and establish team norms. The first day focused on organizational alignment, vision statement creation, and establishing team values.

When the session ended, our Deliberate team used the session inputs to develop a draft vision and values that were reviewed & refined with the president's input. The second day focused on aligning on barriers and opportunities for growth as well as generating starter initiatives. This process ensured that all participants were engaged and contributed to the strategic plan and action items.



The Outcome

Following the offsite, the new president now had:

- A well-defined and aligned vision statement, along with four key team values: trust, collaboration, innovation, and bravery, each with specific behaviors underpinning them.
- Over 50 starter initiatives mapped to their five strategic pillars, with assigned ownership and action plans.

The feedback from the offsite was overwhelmingly positive. Specific outcomes for the new president were

- Better integration into the team, fostering trust and collaboration.
- The session successfully bridged the gap between long-time insiders and new hires, creating a unified leadership team ready to implement the strategic plans.
- The improved alignment and cohesion set a strong foundation for the company's strategic planning for the year ahead and to be shared with the marketing and sales teams



Leadership Team Culture and Team Charter Development

Strategic Alignment Offsite

Leadership Team Culture and Team Charter Development



The Challenge



The Approach



The Outcome

The Chief Growth Officer of a leading biotechnology company sought to bring together approximately 40 top leaders from multiple levels within the organization.

The primary goal was to address the lack of a common mission or charter, which had led to drifting purposes and misaligned goals. The leadership team needed a forum to hear each other's perspectives, align on a common purpose, and build trust. Additionally, they wanted to establish a formal charter to socialize throughout the organization, ensuring a unified vision, mission, purpose, and values.

The challenge also included building initiatives to support their senior leadership charter while fostering team bonding and improving psychological safety.

Before the Event:

The preparation phase involved weekly planning meetings with a core team representing various senior team functions, as well as interviewing and fact-finding workshops. Pre-building the charter allowed participants to review and provide feedback before the offsite, ensuring no surprises and priming them for productive discussions.

The Offsite:

The 2-day offsite in New Hampshire featured a balanced mix of purposeful activities and fun exercises. It started with an inspirational talk to rally the group, followed by interactive sessions to socialize and build trust. The crux of the offsite was the charter alignment exercise, using real-time feedback technology to gauge alignment and facilitate open dialogue. Leadership practices and responsibilities were discussed and refined, with teams creating specific 30-day action plans to ensure follow-through.

- **Formalized Charter:** A memorialized charter that included the "The What" and "The Why" of their team culture and leadership practices was produced.
- **Company-Wide Rollout:** The leadership team charter was later integrated into their development plans and socialized across the entire organization.
- **12-month survey results:**
 - A 1-year retrospective showed that there was enhanced team cohesion, trust, and psychological safety, making remote and hybrid interactions more effective.
 - The company now has a clear, unified vision and strategic direction, with leaders committed to maintaining alignment and fostering a collaborative culture.



Creating an Aligned 5-Year Strategic Plan and Company Vision

Strategic Alignment Offsite

Creating an Aligned 5 Year Strategic Plan and Company Vision



The Challenge



The Approach



The Outcome

The head of strategy for a small biotech firm wanted to bring together their top 14 leaders for a one-day offsite.

This biotech company had recently grown through acquisitions, resulting in different cultures and a fragmented workforce spread across various locations. The leadership team faced the challenge of developing a unified strategic vision and road map while fostering a common culture and enhancing employee development. The relationships among team members were primarily transactional, compounded by the presence of new team members who had not worked together before.

Additionally, the strong-minded CEO often dominated conversations, necessitating a facilitator who could ensure balanced participation.

Before the Event:

We began with extensive pre-event preparation, including interviews with the CEO and leadership team to identify key challenges and goals. A validated survey tool, The Innovation Climate Survey, was administered to the entire organization and aimed to assess the organization's perspectives on leadership, collaboration, and innovation conditions. The survey results highlighted disconnects between leadership and broader organizational views, which informed the event's agenda.

The Offsite:

The morning of the offsite focused on understanding the current innovation climate, facilitating discussions to uncover hidden assumptions, and conducting collective problem-solving exercises. The afternoon shifted to strategic visioning, using a framework inspired by Roger Martin's work on strategic priorities, helping the team identify where they wanted to be, current state challenges, and barriers to success. This process included prioritizing strategic imperatives and creating an actionable road map for future success.

The leadership team walked away with the following:

- A clear and unified strategic vision, along with a detailed road map that included technology, product, market, partner, and capability strategies.
- A playbook that provided a 12-month focus plan with assigned ownership for different team members, ensuring accountability and follow-through.

The event also fostered stronger relationships and trust among team members, who had previously interacted in a limited and transactional manner.

- Participants rated the offsite highly for both productivity and enjoyment, emphasizing the effective balance of work and play throughout the day.
- The newly established strategic plan and improved team cohesion have since guided the company's business development and operational strategies.



Deliberate Innovation



201.724.9111



www.DeliberateInnovation.net



Dan@DeliberateInnovation.net