



## BACKGROUND

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New leadership and a stalled strategic planning process presented a challenge and an opportunity.

The new leadership could influence the strategic direction while convincing those already invested to see the value in taking a few steps back.

# LOST IN THE DARK

A Case Study in Setting  
Context to Plan

## THE STRATEGIC DILEMMA

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Within their first months, the new leadership team assessed a gap in the current strategic thinking that made it seem like the organization's long-range planning was lost in the dark. It lacked an external perspective and a market-based context to evaluate planning priorities. If they completed the plan as it was, they knew they would have to change some of the core assumptions within the first year.

How could the organization confidently set a new direction without an understanding of how it related to the market they were striving to serve?

# A Case Study in Setting Context to Plan

## THE ENGAGEMENT AND OUR APPROACH

Focused Momentum LLC (FM) was engaged to work with the new CEO, COO, Board President, and the legacy planning committee to redesign the strategic planning process addressing its gaps while staying within the current planning timetable.

The goal required clarification of where more in-depth analysis and broader context were needed and conducting a strategy development session that allowed ALL stakeholders (new and legacy) to understand and digest how this market analysis could impact future success. The complexity of this challenge grew because the client operated in at least three distinct market sectors.

Using our Strategic Focus Market Mapping process, the FM team led three separate market sector teams to define and research each market and its dynamics. This analysis included creating a way of viewing the market - building a market map and identifying where competitors or partners operate within this context. Each market mapping presentation included a draft competitive analysis of where the client operated today and its relative positioning to others in this market.

During a two-day Strategy Creation Session, each market map was reviewed, and strategic priorities were set for each market segment. This context clarified the challenges the organization faced and provided new insight into the planning priorities for each market area.

## THE RESULT

Our engagement led to a significant shift in strategic thinking for the final strategic plan.

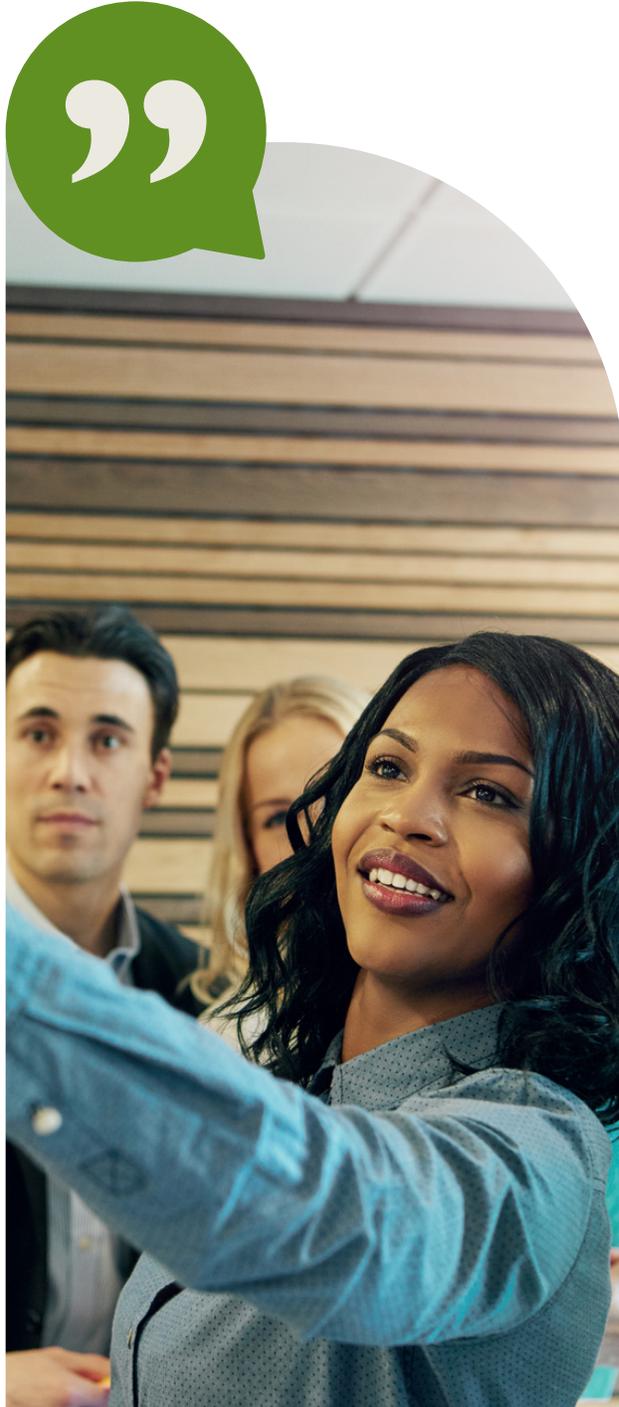
The most substantial implication was the decision to form a new entity to address the challenges and opportunities for one market mapping analysis. The new entity, now separated from the core organization, enhanced the institution's ability to compete against larger institutions without sacrificing focus on core operations in the legacy entity.

This new direction aided the team in securing significant funding to establish the new entity. This investment enhanced the organization's visibility, relevance, and renewed interest in its legacy programs. It provided them a way to deliver on its broader mission across multiple fronts simultaneously.

## OUR TRACK RECORD

A  
YEAR  
AHEAD  
OF  
PLAN

Strategic planning is arguably one of the most visible and significant undertakings for management. Yet alarmingly, 80-85% of strategic planning efforts are deemed a failure by those who lead them. More surprisingly, these figures represent an improvement. So, you might ask, if the odds of success in charting a new strategic direction are so low, should you even try? YES!



**"If you're ready to commit to making something great happen, Focused Momentum is the place to start."**

Strategic planning positions your organization for continued success.

Focused Momentum has guided clients in strategic planning for over 20 years, so we can examine our track record.

Our clients consistently achieve their strategic goals a year or more ahead of their plan.

[Schedule a call to find out how to work with us.](#)