

CentStrat – Strategy Session I

Example developed by Marc E. Schwartz

Strategy Session General Guidelines:

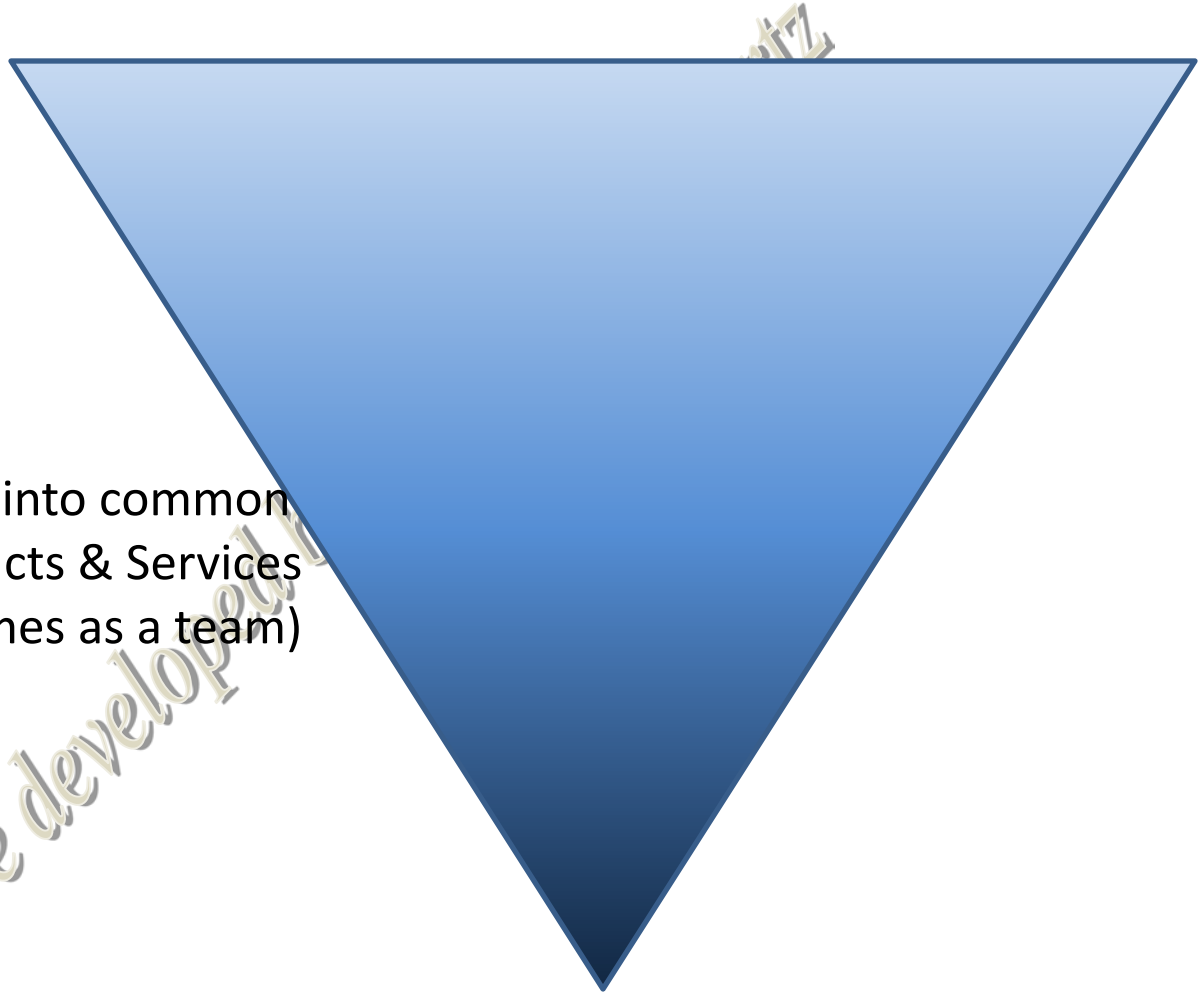
- Please stay focused and help others do the same
- Respect & professionalism – no worries – nuff said
- Make sure if you have an item not on the agenda it gets to the parking lot
- All Ideas are good ideas
- What's here stays here
- If you are not sure ask
- Feel free to move around, document, add, draw
- Smile have fun
- others.....????

Session One – Objectives / Agenda

Develop common skill sets
In a number of effective areas
(Use bios & in pairs)

Compress skills into common
Themes – keep to Products & Services
(discover themes as a team)

Example development



**Focus on 3 – 5 Key
Products and Services
Team Goal**

Breakout – Part 1 initial Theme Discovery & Development

- Pair off using bios of anyone else except you & your partner
- Review bios and build a theme 1 theme at a time
- Support theme by being specific in one sentence what it is
- Support theme with skill sets from bio – use action words and verbs
 - What specific project/product/service
 - How is the theme accomplished per using the skill set
 - What ancillary & support skills are available (Chemistry and Fit)

Document on paper or 4 x 6 cards – make notes so that the theme can be explained and brought into the group for part II

Please come back with at least **5** themes + Support

Feel free to offer other ideas/jot idea as time runs out for undeveloped themes other issues/parking lot items is/as they surface



Typical / General Focus Marketing Areas:

- Developing/Managing Products
 - Line Extensions/Product Modifications
- Branding/Co-Branding
 - Product Positioning/Repositioning
- Advertising/Promotions/Public Relations/Selling
- Distribution/Logistics/Supply Chain
 - Retail & Wholesale
 - Warehousing & Inventory
- Strategic Planning
- Market Research
 - Trends/Forecasts/Customer Focus/ Competitive analysis
- Pricing

Other Areas of Interest:

- Organizational Development
- Lean Manufacturing – Six Sigma – Process & Product Improvement
- Quality & Quality Assurance
- Finance
- Information Technology & Management Information Technology
- Global & International (extrapolation from marketing)
- Others such as Research & Development, Training, Operations, Engineering
Human Resources + Legal...

The World of Marketing

Organizational
Support

Finance/IT

Marketing Strategies

Market Research
Trends/Forecasts

Customers/Purchasers
B2B – Electronic - VOC

Distribution
Supply Chain
Retail/Wholesale

Product
(Lifecycle)

Promotional
Ads/PR/Sell

Quality/Lean
Process Improvement

Global/International

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Part II Theme Discovery & Compression

Each group will disclose theme to the entire team

We will document on flip charts/use the 4 x 6 cards to group

Team will arrange/consolidate and align products & strengths

We will work together and may have to re-write some themes – that's ok

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Part III Discovery of Products and Services with supporting strengths

Team will select top items and key strengths

We will work together to continue theme compression

And highlight products and services that we feel comfortable with

We will rank order those items using a 1 – 5 scale 1 being of highest Importance/Priority/Skill set

We will shift and consolidate based on the order process and discuss
This should bring us to a top 5 with a qualitative assessment.

Additional consolidation and the marketing component of each
Theme/product will be addressed as part of session II

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CentStrat
Wheel of Marketing
TOP
FOCUS

3. ??????????

4. ????????????????

1. ??????????

2. ??????????

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Thank you & follow-up

Appreciate you sending a brief evaluation to Marc.e.schwartz@gmail.com

1. Was content OK what could have been added/subtracted?
 2. Could something have been improved/made easier?
 3. Are you satisfied – if not how can we get you more comfortable?
- A summary will be forwarded to the participants in a few days
 - An agenda will be developed and sent for next Thursday's Session II
 - Any other items – something forgotten or wanting to add – send to the above email