



Mentorship Series

How to Craft a Game- Changing Strategic Plan



How do you
facilitate a game-
changing strategic
plan?

Stay to the end..

- A recording for today's event...plus access to...

How to Conduct a Game- Changing 15-30 Year Strategic Planning Retreat

Without Taking More Than 2 Days



What are Game-Changing Examples?

- *Cable and Wireless vs. Digicel*
- Buggy Whip Makers vs. Automobile Manufacturers
- Excite/Microsoft/Yahoo! vs. Google Search
- Blockbuster vs. Netflix
- Blackberry, Nokia, Ericsson vs. Apple iOS /Android
- Kodak vs. Fuji
- AOL TimeWarner vs. Disney
- Borders/Barnes & Noble vs. Amazon
- Xerox Alto vs. Apple II 1979
- Unisem, Mostek, Advanced Memory Systems vs. Intel 1990s
- Capriati vs. Williams Family (Tennis)
- Dell vs. Asus
- Boeing vs. Airbus (Safety)
- Intel vs. Nvidia (AI Chips/GPU) 2023

How do you facilitate a game-changing strategic plan?

Are the naysayers correct?

“You need to be lucky”

“You need to be abroad / outside Jamaica”

“You need to get every stakeholder on board...before you can start”

“We already tried that – it doesn’t work for us”

“We’d need different staff”

Today's Agenda – To Get One Insight

- Interactive Presentation
- Q&A's along the way

Turn off distractors!

Who is this for?

- Executives
- Small business owners
- C-Suite hopefuls

Mike's Story

Mike is a local CEO.

A new board was just elected and in the first meeting they asked for more than the usual short-term thinking.

“We want to see a breakthrough plan!”

“Investors want to know what you are going to do that's different?”

“I didn't join this board just to keep things the same”

The only strategic planning he has ever been part of was in the government. How does he deliver?

Defensive. Anxious. Negative naysayers. Staff not capable. Dreams.

What if it's never solved?

Why it's hard.

Typical solutions...What vs. Why

A study of 53 interwoven short/long-term strategic plans

- 15-30-year horizons
- Organizations
- From 2002-2024

FRAMEWORK
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Newsletter

www.longtermstrategy.info

The EndPoint Method - 2002

- Current State
- Vision
- Strategy

Secret #1 – How to Provoke Game-Changing Thinking?

Secret #2 – How to Be Inspired + Inspiring

Secret #3 – How to Persuade Others

Secret #1 – How to Provoke Game-Changing Thinking

...without needing to hire geniuses

The EndPoint Method 2024 - Details

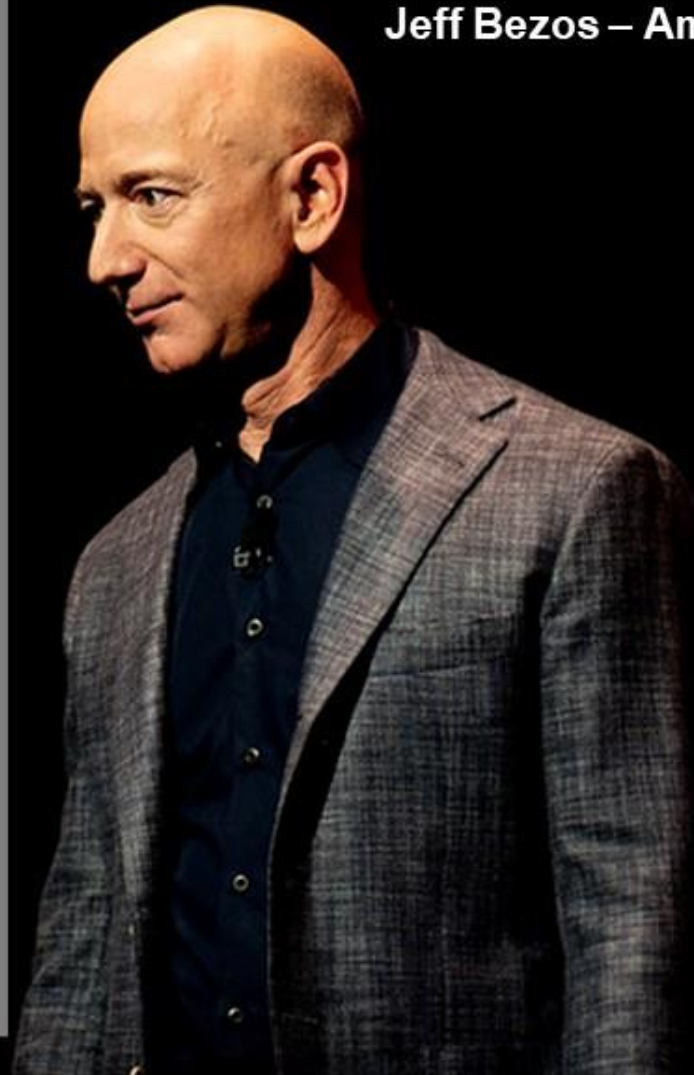
- Snapshot
- Spot
- Alternative Choosing
- Detailing a Single Alternative
- Endpoint Backcasting
- Short-Term Strategy Mapping
- Project Assignment

**Current State
Vision**

Strategy

If everything you do needs to work on a three-year time horizon, then you're competing against a lot of people. But if you're willing to invest on a seven-year time horizon, you're now competing against a fraction of those people, because very few companies are willing to do that. Just by lengthening the time horizon, you can engage in endeavors that you could never otherwise pursue... We're willing to plant seeds, let them grow—and we're very stubborn. We say we're stubborn on vision and flexible on details.

Jeff Bezos – Amazon.com



What is Your Sweet Spot?



Reggae Boyz Strategic Plans

3 Year Strategic Plan		
Today:		

Reggae Boyz Strategic Plans

3 Year Strategic Plan	30 Year Strategic Plan	
	Today:	

Reggae Boyz Strategic Plans

3 Year Strategic Plan	30 Year Strategic Plan	100 Year Strategic Plan
		Today:

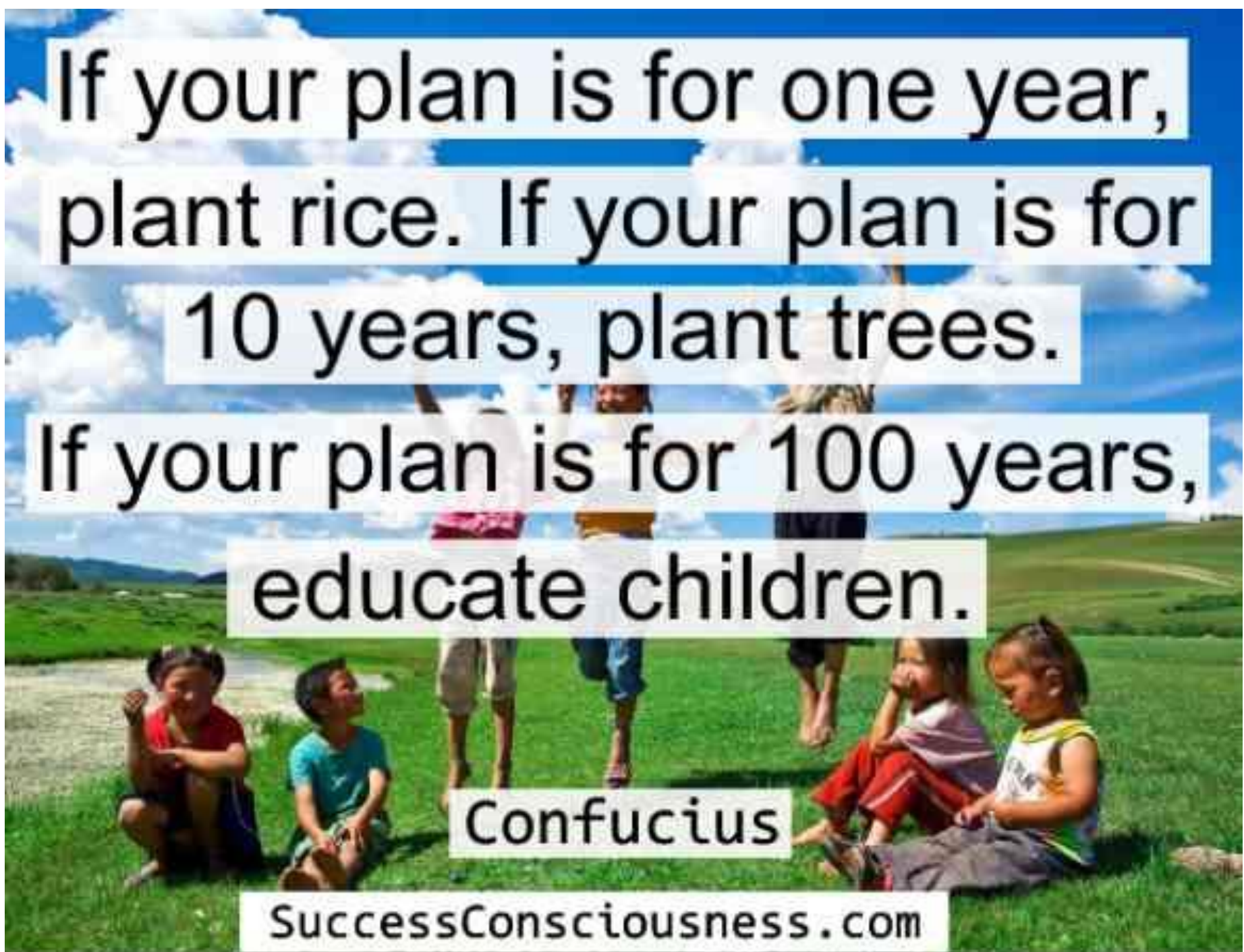
Now!

If your plan is for one year,
plant rice. If your plan is for
10 years, plant trees.

If your plan is for 100 years,
educate children.

Confucius

SuccessConsciousness.com



The EndPoint Method 2024

- Snapshot
- Target Year in the Sweet Spot
- Alternative Choosing
- Detailing a Single Alternative
- Endpoint Backcasting
- Short-Term Strategy Mapping
- Project Assignment

**Current State
Vision**

Strategy

Inexpensive, Quick Game-Changing Steps

- Pick a long horizon
- Determine what “game-changing” looks like
- Translate a game-changing future into a strategic plan
- Focus on today’s actions / implementation

Case Study



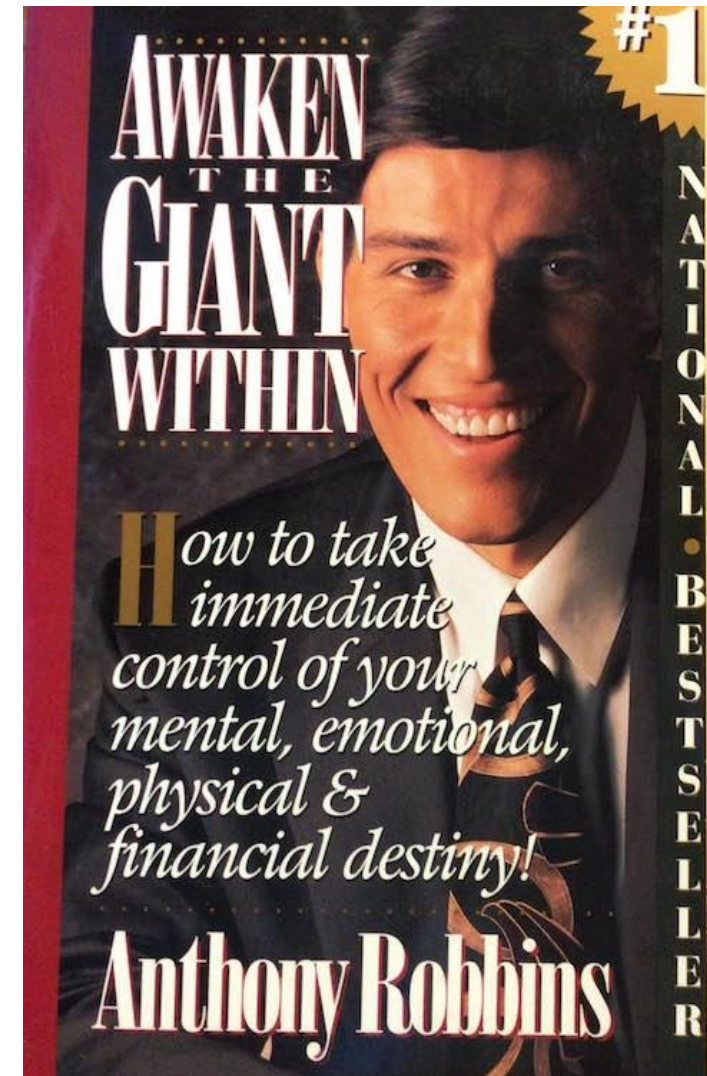
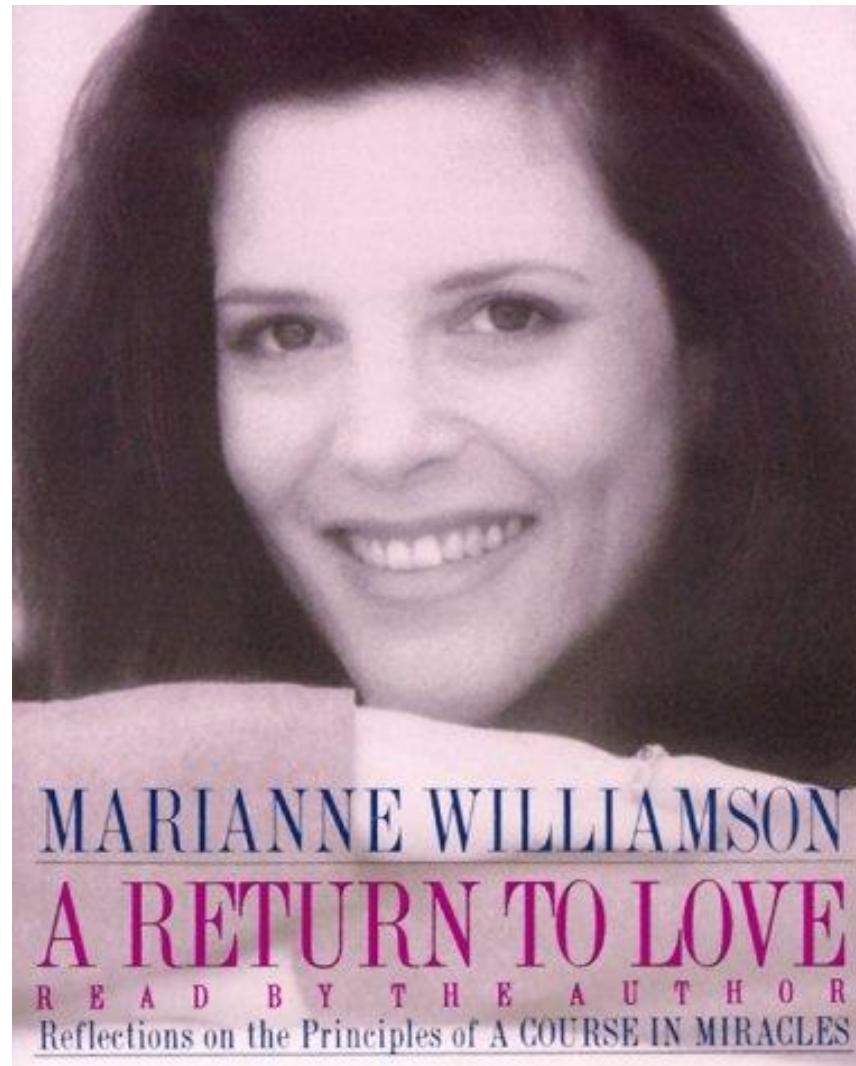
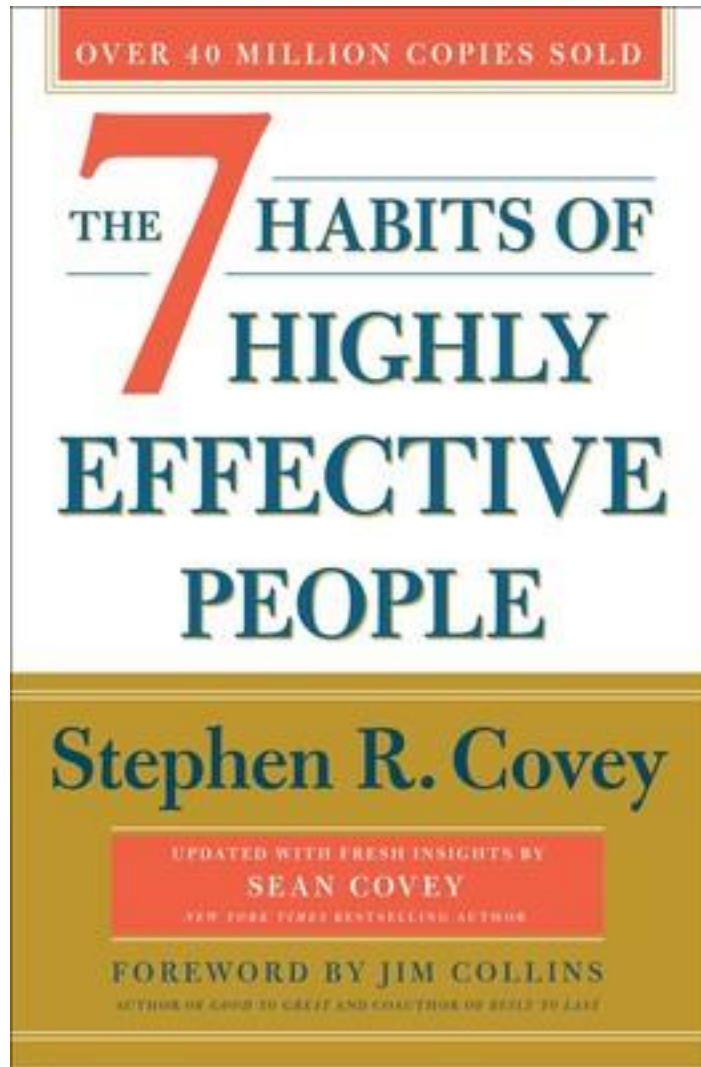
Secret #2 – How to Be Inspired + Inspiring

...without hiring expensive outside consultants

A Way to Not Do This Alone – “Grouped Planning Dynamic”



Personal Development by Book





Grouped Planning Dynamic

- Bring a group together of up to 20 participants
- Include board / staff / C-Suite
- Move them through the stages together

Current State
Vision
Strategy

A woman with long brown hair, wearing a grey blazer, is seen from the back, counting several US dollar bills at a computer workstation. The workstation includes a monitor displaying a webpage, a keyboard, a mouse, and a printer. A man in a brown suit and glasses stands behind the desk, looking towards the woman. The background shows an office environment with glass partitions and other workstations.

Case Study: A change in ownership

Secret #3 – How to Persuade Others

...without over-promising

Big Challenges – Start from the Future and Work Back (Merlin Process i.e. Backcasting)

	2023	2024	2025	2026	2028	2032	2038	2045	2055
Revenue	\$75m								\$2b

Challenge – Backcasting 2

	2023	2024	2025	2026	2028	2032	2038	2045	2055
Revenue	\$75m							\$1.5b	\$2b

Challenge – Backcasting 3

	2023	2024	2025	2026	2028	2032	2038	2045	2055
Revenue	\$75m						\$1.2b	\$1.5b	\$2b

Challenge – Backcasting 4



	2023	2024	2025	2026	2028	2032	2038	2045	2055
Revenue	\$75m			\$400m	\$650m	\$900m	\$1.2b	\$1.5b	\$2b

Challenge – Backcasting 5

	2023	2024	2025	2026	2028	2032	2038	2045	2055
Revenue	\$75m	\$125m	\$200m	\$400m	\$650m	\$900m	\$1.2b	\$1.5b	\$2b

Challenge – Backcasting 6

	2023	2024	2025	2026	2028	2032	2038	2045	2055
Revenue	\$75m	\$125m	\$200m	\$400m	\$650m	\$900m	\$1.2b	\$1.5b	\$2b
Profit	\$5m	\$7m	\$15m	\$32m	\$50m	\$60m	\$0.08b	\$0.10b	\$0.25b

	2022	2023	2024	2025	2028	2032	2038	2045	2055
Project #1									
Project #2									

How the results will be produced

	2001	2002	2003	2005	2010	2016
Members	34k	38	42	46	50	55k
Revenue	\$92m \$	106 \$	117 \$	135 \$	155	\$180m
Surplus	\$8.4m \$	26 \$	44 \$	62 \$	80	\$100m
# new Board members	0	10%	20%	30%	40%	50%
		\$	\$	\$		
Fee income	0	0.38	0.75	1.13		\$1.5m
Tech gap to financial inst.	-50	-45%	-40%	-30%	-20%	-15%
# branches	3	3	3.3	3.5	3.7	4
# atm's	0	1	2	3	3	4
Loan growth	-1%	1%	2%	4%	6%	10%
Staff	135	10	15	20	30	210

Initiatives

CRM software

Reward and Recognition

New branding

New nomination process

Market research

Training

Advertising

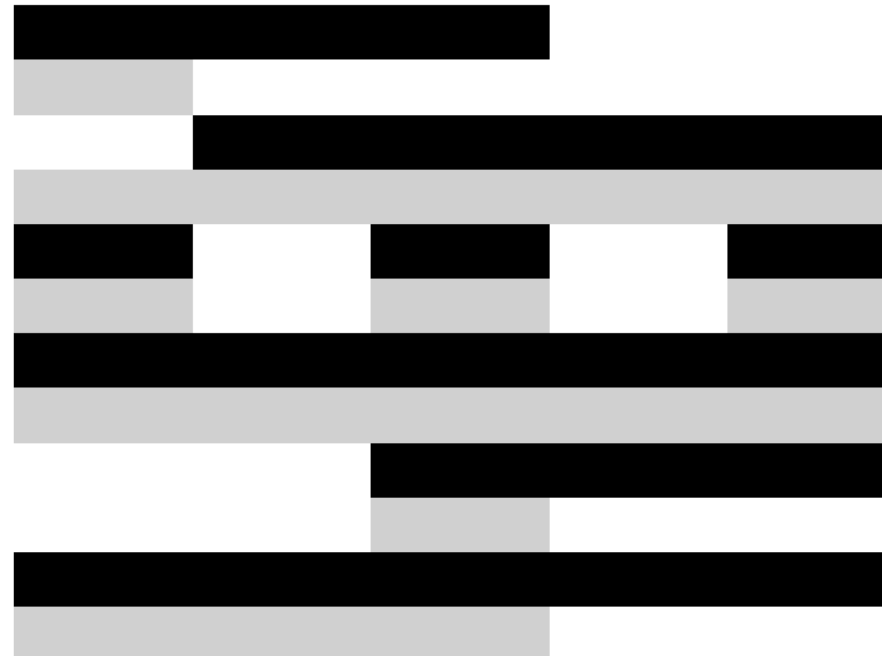
Foster alliances

Acquisitions

Online Banking

Corp Comms Plan

Organizational Restructuring



Fictional
Co-operative Credit Union

Your Mission – Remember?

Choose an organization you
belong to and create a game-
changing strategic plan

Examples

- Jamaica Vision 2030
- Moonshot 1960's - Appollo



<https://blog.fwconsulting.com>

to register for updates

ADVISORY COLUMN: PRODUCTIVITY



Francis Wade

How to exer in stressful

YOU ARE a bit worried at the job. Why? You remember when it was easy to bounce back from disappointments, but lately, your old tricks no longer seem to work.

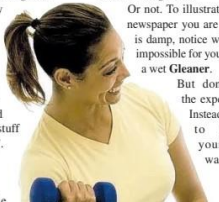
It could be a problem with your boss, a dip in performance or even the pressures of inflation. These things should come and go, but sometimes they linger. At times, stressful feelings even spread to your teammates.

In this article, we'll explore a resilient way to manage your frame of mind regardless of the business challenges you are facing. Thankfully, there is a striking new point of view emerging that we can borrow, but we need to think differently in order to implement it for daily use. The radical idea? As author Byron Katie succinctly

experience you are momentarily "Having". Now, apply the same concept to other intangibles such as the thoughts passing through your mind. Then pick up on your internal emotions or feelings as they relate to key relationships in the workplace and company culture.

These are all factual elements - things that add up to a pile of stuff you are "having".

ONE-BY-ONE WANTING



ADVISORY COLUMN: PRODUCTIVITY



Francis Wade

Creating vision of t

AS A founder or CEO in your company, you want to get the most from stakeholders. Some react positively, wanting the best for the organisation.

But now and then, you observe glaring gaps even among motivated individuals. For example, their departments can end up working at cross-purposes. Why? The problem is that their managers see the future differently.

Although you consistently restate the vision as a leader, it doesn't seem to be memorable.

You would like to coordinate them with a single, well-defined destination but don't think that repeating your vision is enough. Perhaps you need to take a different approach.

Does it matter?

grumble. What you have failed to realise is that human beings, once their basic needs are met, want to live and work inside an inspiring future. And furthermore, when they don't see it materialising, they take matters into their own hands. Instead, they follow personal furies.

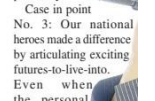
Case in point No. 1: Your best staff members are more excited about migrating than staying in your company. You think it's just 'life in Jamaica', but no. They reject the 'future-to-live-into' offered by your leadership.

Case in point No. 2: The board wants to see the organisation make some big bets. But its directors don't

on YouTube and TikTok. What jobs were the statements originally supposed to do?

In the past, they used an inspiring future-to-live-into. As popularised by Werner, it is defined as an invent that is 'language', visual shared in ways that compel people to react positively.

Case in point No. 3: Our national heroes made a difference by articulating exciting futures-to-live-into. Even when



ADVISORY COLUMN: PRODUCTIVITY

Rank your c



Francis Wade

YOUR COMPANY, like most others, has a vision or purpose statement. The initial idea was to bring inspiration, but, recently, there appears to be a decrease in excitement surrounding it. What interventions can you make to ensure your staff works together and adds their discretionary effort? And how should the statement fit into your corporate strategy?

The reasons to forge an effective vision are simple to understand.

As we human beings look to the future, we can't help but imagine what things might



ADVISORY COLUMN: PRODUCTIVITY

Three hidden reasons to think long term

ADVISORY COLUMN: PRODUCTIVITY

How to be produ



Francis Wade

YOU ARE a high-achieving manager, satisfied that your accomplishments didn't come by luck. Instead, you have worked hard to set and reach your goals.

But lately, you have felt as if your lofty ambitions weren't

who, we think, should be happy but aren't. If we were in their position, we believe, we would be fulfilled.

Continue in that vein and notice that there are many Jamaicans who actually yearn for what you have. Case in point: As a reader of this **Sunday Gleaner** column, you are probably in the top 10 per cent. And, therefore, in the world's top 25 per cent.

However, despite your privilege, you remain driven. Even when people say you "should" be happy

you to 'continue' sitting, standing or lying down. As such, I'm engaging in everyday speech which 'accepting your standard means you wish to keep doing

This is a problem that speaks of Turkish, Finnish, and Korean don't have. They are able to want what they are doing in the moment without wanting more of it in the future. Why? They have different words for the two kinds of wanting.



Francis Wade

AS A leader, you already know that organisations in both the private and public sector need to think long term. Hence, you can instantly identify common explanations.

But there are some nagging corporate problems that don't seem to have anything to do with long-term thinking. Consequently, their appearance catches leaders

way. So did Southwest Airline, which precipitated a global disruption in 2022 due to their failure to invest in long-term software improvements.

Besides this problem, there is also an impact on the number-one issue organisations report on, their strategic planning: poor implementation. When a company has no long-term vision, savvy executives tend to unconsciously withhold their support. Why? They recognise that the commitment is shallow. And likely to shift when the breeze changes direction. Therefore, there is no need to spend valuable social capital, budget, and time on a short-

competitive edge.

But this is just a situation. You may be acquainted with a full PESTEL suite - economic, social, technological, environmental and legal factors. When companies with a short-term horizon open to incipient threats and opportunities pass them by, limited thinking fails to lurk possibilities.

As such, they leave themselves open to incipient threats and opportunities pass them by, limited thinking fails to lurk possibilities. For example, in 2011, I looked into the future and envisioned an all-encompassing ecosystem built around