WORKBOOK

Strategic Planning the Genuine Contact Way

Genuine Contact™ Way Module

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In this learning journey we will explore

that you uphold our trust by not sharing the workbook with others or using it for purposes other than our program together.

Introduction
and Orientation

> *I love the strategy focused culture because of its impact in closing the gap between potential and results.*
>
> *~ Birgitt Williams*

What is the invitation?

You are invited to learn strategic planning that includes learning about the development of a strategic plan AND what needs to be in place for the strategic plan to be successfully implemented.

You'll learn about the development of a strategy focused organization including a strategy focused culture.

Having a plan isn't enough. Researchers, including Norton and Kaplan at Harvard, have found that 70-90% of strategic plans fail to be executed. We did our own research, studying within that small percentage of organizations that successfully execute their strategic plans. Strategic Planning the Genuine Contact Way was developed based on what we learned needed to be in place for success with strategic plan execution.

Leaders, managers, and organizational development consultants will learn how to turn great ideas in their organizations into outstanding results by creating clarity, alignment, and a systematic approach to evaluating and managing organizational performance in relation to strategic plan execution.

Throughout this learning program, you will learn:

- the critical ingredients for developing a strategic plan that actually gets implemented instead of just sitting on a shelf gathering dust
- Simple processes you can use to engage your organization while developing the plan to tap into the collective wisdom of your people for innovation, wise action, and extraordinary results
- how to develop the strategic planning process to create join-in from the beginning rather than trying to convince your people to buy into the plan once it is done
- the value of a collaborative approach throughout the organization in the development of the plan
- Skills, knowledge, confidence, and commitment to lead this work masterfully

Why use this approach?

This approach avoids common mistakes in the strategic planning process. Common mistakes lead to strategic planning exhaustion; the futility associated with strategic plan implementation;

the challenge of creating buy-in to a strategic plan; rigidity in the plan that doesn't take a changing environment into account; and the most common mistake of having people feel as though they are doing their jobs plus having to work on the strategic plan implementation.

Strategic planning the Genuine Contact Way is rooted in what works. This approach:

- keeps strategic plan implementation at the core of the strategic planning process rather than limiting the work to just creating a strategic plan
- engages people without leaving them exhausted
- involves people throughout the organization, developing an understanding of what is in the plan and why, as the plan develops so there is no need to expend energy to get people to buy in to a plan
- innovation is built into the plan as an essential part of the functioning of the organization
- monitoring for the purpose of timely adjustment is built in
- periodic strategic plan refresh is built into the planning to keep the plan alive, viable, and relevant to the environment

We keep it simple, with simple tools to handle complexity. We recognize that change is constant, and any planning needs to take into account a changing performance environment. We recognize the value of conversations and collective wisdom gathered in participatory meeting processes to come up with the best plans, the best way of closing the gap between potential and results.

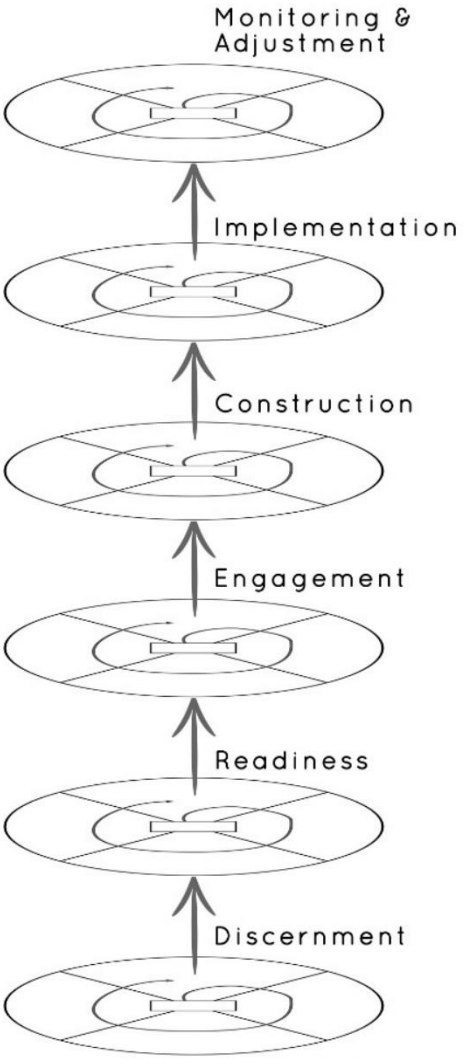
Who needs to be involved?

Ideally, everyone affected by the strategic plan and those responsible for implementing it are involved in strategic planning. Some organizations use a whole system approach to involvement, figuring out who has a stake in the strategic planning, inviting a broad spectrum of stakeholders.

Formal leaders, managers, and consultants have clear roles in preparing the organization as a strategy focused organization and leading the strategic planning with that intention in mind.

How does it work?

Learning in this module is offered through 6 phases of learning, based on the Evolutionary Spiral. One of the multi-use tools that make up the Genuine Contact Toolkit, the Evolutionary Spiral offers a roadmap of your learning and development. Every phase provides the tools and tips for taking your organization through a Strategic Planning process the Genuine Contact Way.



Evolutionary Spiral

1. **Discernment:** You will begin by establishing working definitions that capture your perceptions of what strategic planning is and is not. You'll establish your concept of a strategy focused organization or culture, developing clarity about what you need to set up for successful strategic plan implementation. You will be presented with five beliefs for the purpose of considering their implications for your strategic planning efforts within the performance environment of complexity and constant change.

2. **Readiness:** In this phase, you will learn what you'll need to do to ensure sufficient readiness in an organization for strategic planning. You'll be guided in developing a readiness checklist complete with actions that you can take towards readiness for the strategic planning.

3. **Engagement:** You will be taken through a series of activities to engage you with the art of strategic planning. You'll increase your confidence and capacity for leading strategic planning and working with the strategy focused organization. In this phase, you will learn the tools that you will use during construction of your plan. You'll come to a new understanding of working with the weaving together of people with process with strategic planning technology.

4. **Construction:** In this phase, you practice taking a group of people through constructing a strategic plan with the tools and tips you have learned. You'll come through this phase with increased competency in leading an organization through strategic planning. You'll create a presentation to orient teammates to the way you want to do strategic planning, a presentation that will become part of your own toolkit for your work in the future.

5. **Implementation:** Through role play, you'll have the opportunity in this phase to explore what is necessary for implementation of a strategic plan, exploring obstacles and opportunities. This phase provides clarity about what needs to be put in place for successful implementation of a strategic plan. You will add a presentation about implementation to your toolkit for your work in the future.

6. **Monitoring and Adjustment:** You'll look at the difference between performance management and monitoring & adjustment. In this phase you will identify what monitoring needs to include and why. If monitoring shows that the implementation of the strategic plan is off course, adjustments will need to be made. You'll learn what is meant by a strategic plan refresh if the decision is that the plan itself needs adjusting.

The module is designed with follow-on facilitated peer-with-peer mentoring circles to support your ongoing learning with Strategic Planning the Genuine Contact Way. These mentoring circles include group discussions facilitated by a Genuine Contact Trainer about what has been learned while applying your learning so far.

Origin story of strategic planning the Genuine Contact way

The origin story of Strategic Planning the Genuine Contact Way is told by Birgitt Williams, co-creator of the Genuine Contact Program and Genuine Contact Way of working and living.

Many years ago, I served on multiple Boards of Directors of non-profit organizations, a key aspect of our responsibility was to have a strategic plan for the organization. The funders of these organizations demanded that the organization be able to produce a strategic plan when applying for funding and renewal of funds. In every Board, we mobilized ourselves to get this job done. In some, we carried out a strategic planning activity ourselves as Board members, in others we engaged external consultants to guide us through a strategic planning process. We understood it to be the work of the Board, accompanied by the CEO as our staff resource.

Here's what happened. We created good strategic plans, plans that would make a positive difference in our city. We instructed the CEO, in each case, to implement the plan.

The CEO added tasks to the operational plan that were deemed appropriate for implementing the strategic plan saying, "this is what the Board wants". Staff, who perceived the implementation of the strategic plan as additional work to the great volume of work already being done were not happy with the Board of Directors. In all the examples that I witnessed as a member of the Board, the strategic plan was insufficiently implemented. Some Board members shrugged this off, saying that we only needed to have evidence of a plan to please the funders.

I then was on Boards that considered themselves to be savvier. With the United Way's leadership, many organizations were, at the time, adopting John Carver's form of Board Governance. A result was that in these Boards, based on our policy governance, we instructed the CEO to implement the strategic plan, and stated that we were holding the CEO accountable for implementation of the plan. More than one of the CEOs ended up quitting their jobs, and one was fired, all because they couldn't get the plan implemented successfully.

As a CEO myself, I was concerned about what was happening. Our Board was getting itself ready to develop a strategic plan. I wondered what we could do to improve the likelihood of implementing our strategic plan. We were not doing it for the purpose of having the strategic plan for the funders. Yes, that was a benefit of developing the plan. Our greater need was to have a strategic plan and implement it to support the work we were doing within the context of the recent merger of three organizations into one. A lot was at stake.

I had learned about participative processes based on whole systems work. I talked with the Board members, suggesting that rather than the Board developing the plan, that all members of staff and a representation from our many volunteers be part of the strategic planning process. They agreed. I was sure that by including the people who would implement that plan, we would have success with the implementation as there would be ownership for the plan. It made a lot of sense to me, and still does.

We came up with a good strategic plan. Board, staff and volunteers all had a say in what went into the plan including prioritizing. The plan was handed to me to make sure implementation occurred. I was very confident that with the staff and volunteers we would be successful. I used participatory meeting processes with the teams to incorporate activities related to strategic plan execution into the operating plan. Everyone was on board with getting the expanded job done. There was some delight in understanding how the work of each individual and team tied into implementing the strategic plan.

Months passed. Implementation was not going well. We had a meeting to talk it over. The conclusion was that we didn't have the capacity to implement the plan. I asked for more definition of the capacity that we needed that we didn't have. We had some ideas but recognized we didn't have the whole picture of what the obstacles were, our internal obstacles. This got me thinking about the various CEOs on whose Board of Directors I sat. None of us on the Board had considered whether the capacity to implement our strategic plans existed. We had, in hindsight, done an incomplete job and didn't set the CEOs or their organizations up for success with strategic planning implementation.

I looked into research for help, wondering if there was any groundbreaking work in strategic planning that took both participatory methods and capacity development into consideration. I didn't find any. What I did find was Strategy Mapping by Norton and Kaplan of Harvard who addressed not only capacity development (they called it development of capital). They also addressed vital internal processes. I found Blue Ocean Strategy Canvas by Kim and Mauborgne who addressed value innovation, in which value and affordability can both be achieved. Then came Lawlor and Worley's work Built to Change, with its emphasis that all organizations need to build themselves to change, leaving behind ideas of building for stability. All three of these works provided guidance on the capacity that needed to be built, and guidance on avoiding traps in typical strategic planning.

None of these resources, however, took advantage of what those of us who specialized in whole systems change work had figured out. Our research and experience, based on critical mass thinking, took into account that for any significant change to take place, at least ten percent of the people of the whole system, from every layer in the organization, needed to be involved in the development.

I took away from all this the recognition that the implementation of strategic planning created change, and theories and practices of whole systems change work needed to be part of strategic planning. I figured out how to incorporate aspects of the Blue Ocean Strategy Canvas and Strategy Mapping, combining it with whole systems work that involved participatory methods throughout the strategic planning. With Strategy Mapping, we had found just the right link between high level strategies and operational planning so that they were connected to create conditions of success for strategic plan implementation.

We have tested our Strategic Planning the Genuine Contact Way for two decades, in organizations of all sizes, private, non-profit, community, and government, cross culturally. It works. We believe in 'if it works, use it'.

Five Beliefs of Genuine Contact

Underpinning this Strategic Planning the Genuine Contact Way module are the five beliefs that Genuine Contact is rooted in. These inform our way of working and are one of the core concepts foundational to the Genuine Contact Way and explored deeply in the book *The Genuine Contact Way: Nourishing a Culture of Leadership*.

As you learn Strategic Planning the Genuine Contact way, we offer you these five beliefs. We offer nothing more about these beliefs at this time as it is important for you to draw your own insights, understandings, and possible conclusions about the relationship of these five beliefs and strategic planning. You are invited throughout your learning to explore how paying attention to these five beliefs affects the way strategic planning work is approached. As you carry out your learning, it is also useful to include how not paying attention to these five beliefs affects the way strategic planning work is approached.

1. **We believe that every organism (including the organization) has within it the blueprint for its own optimal health and balance.** We trust the people in the organization to know what is needed for optimal effectiveness. Building on the strengths within the organization is a key to optimal effectiveness.
2. **We believe that focusing on genuine contact enables individuals and organizations to achieve the individual and organizational health and balance that is needed for optimal effectiveness.** Positive change in the organization is directly linked to positive change in individuals. Both are required for sustainable new ways of working.
3. **We believe that Spirit or spirit matters (conscious energy), that through spirit or Spirit all of creation is connected, and that people are precious.** Our experience is that strategies based on these values have exciting, tangible results.
4. **We believe that change with its accompanying loss, grief work, and conflict is constant.** Individuals and organizations that develop mastery in working with change can sustain optimal effectiveness. These leaders and organizations recognize that change cannot be managed, that energy spent trying to manage change is wasted energy, and that productive use of individual and organizational energy is achieved by working with change rather than against it.
5. **We believe in keeping it simple.** Simple frameworks and processes enable success with complex situations. In keeping it simple, we recognize that any sustainable change must begin from the inside and cannot be externally initiated or driven.

1. Discernment

Discernment involves the heart which does not judge yet tells you what is true for you.

~Birgitt Williams

We begin with discernment, providing an opportunity to examine baseline reflections and measures that capture your perceptions of strategic planning, what it is and is not. These baseline reflections include identifying what you already know about strategic planning. We offer questions and tools to help you with your discernment examination. By the end of this discernment chapter, you will have captured your perceptions into working definitions of strategic planning and the strategy focused organization or culture This is intended to help you develop clarity about what you need to set up for successful strategic plan implementation. You will be presented with five beliefs for the purpose of considering their implications for your strategic planning efforts within a performance environment of complexity and constant change.

Your starting point: establishing baseline measures

Answering the reflection questions in this section provides an opportunity to examine your baseline measures to capture your perceptions of strategic planning.

To continue to support your preparations for learning, you are invited to answer the following reflection questions using a scale of 1 to 10, with 1 as low and 10 as high.

How much do you feel that you know about what strategic planning is?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about helping an organization get into readiness for strategic planning?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about engaging the people of an organization in strategic planning?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about constructing a strategic plan that leads to successful implementation?
1 2 3 4 5 6 7 8 9 10

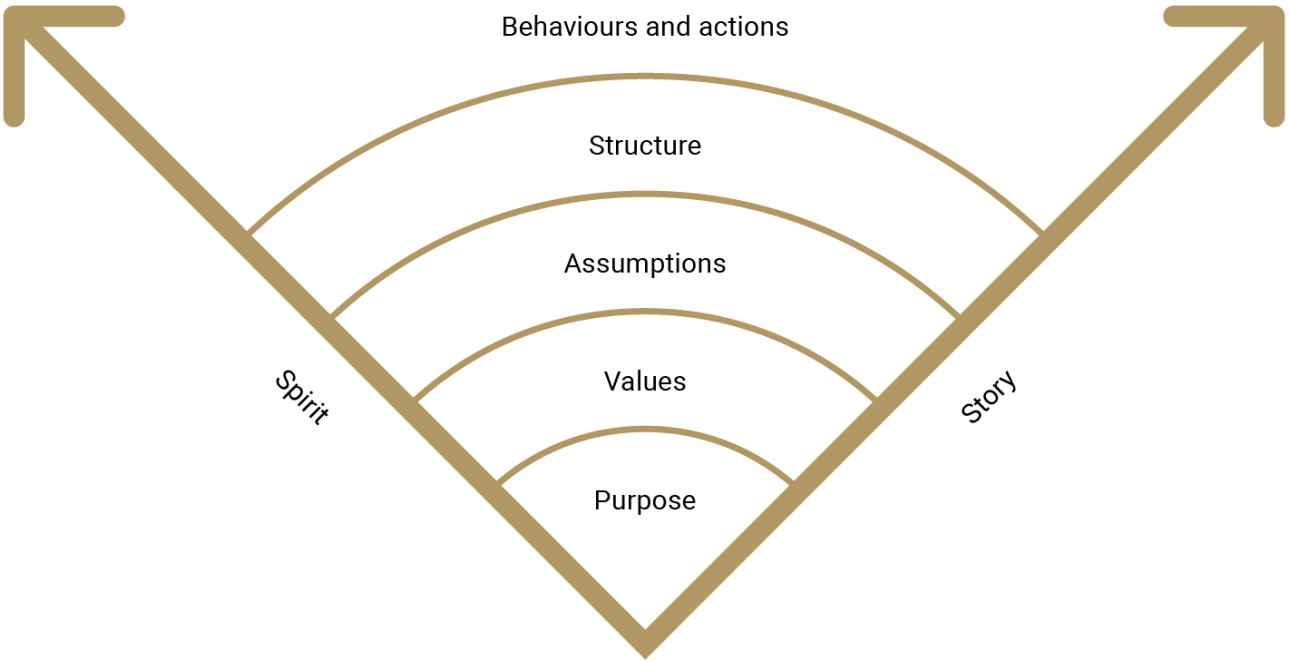
How much do you feel that you know about implementing a strategic plan?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about monitoring and adjusting a strategic plan?
1 2 3 4 5 6 7 8 9 10

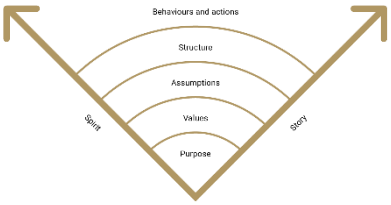
Over time, you may find it beneficial to return to these questions and ask them of yourself again. Checking against your baseline measurements over time can support you in tracking your progress in working with strategic planning.

Developing working definitions

To proceed with the learning so that you make it uniquely yours, it is important for you to have working definitions of strategy, strategy focused culture, and strategy focused organization.



To assist you in developing the working definitions, the best Genuine Contact tool to use is the Deep Essence Tool. You'll need to work through three Deep Essence Tool activities, one for each of the three working definitions that you are developing. Using the tool in the following order will help you bring your thoughts to your conscious awareness: story, spirit, assumptions, values, purpose, structure, behaviors and actions.



Strategy
Working Definition

What is the story you have about what strategy is?

What is the spirit of strategy?

What are the assumptions you make about strategy?

Look at the assumptions that you noted and circle the ones that you believe are truly useful.

Looking at the circled assumptions, what are the values that support these assumptions?

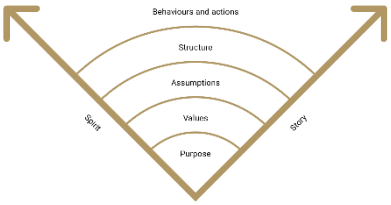
Looking at the values, what do you conclude is the purpose of strategy?

When thinking of strategy, what structure comes to mind?

When thinking of strategy, what behaviors and actions come to mind?

My working definition for what strategy is:

My working definition for what strategy is not:



Strategy Focused Culture Working Definition

What is the story you have about what a strategy focused culture is?

What is the spirit of a strategy focused culture?

What are the assumptions you make about a strategy focused culture?

Look at the assumptions that you noted and circle the ones that you believe are truly useful.

Looking at the circled assumptions, what are the values that support these assumptions?

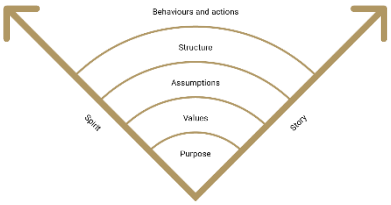
Looking at the values, what do you conclude is the purpose of a strategy focused culture?

When thinking of a strategy focused culture, what structure comes to mind?

When thinking of a strategy focused culture, what behaviors and actions come to mind?

My working definition for what a strategy focused culture is:

My working definition for what strategy focused culture is not:



Strategy Focused Organization Working Definition

You may think it is redundant to develop a working definition for a Strategy Focused Organization when you have already completed your working definition for a Strategy Focused Culture. Maybe you will conclude that they are identical. However, before reaching this conclusion or a different conclusion, you are invited to do the work of discernment to uncover if there are similarities or differences.

What is the story you have about what a Strategy Focused Organization is?

What is the spirit of a Strategy Focused Organization?

What are the assumptions you make about a Strategy Focused Organization?

Look at the assumptions that you noted and circle the ones that you believe are truly useful.

Looking at the circled assumptions, what are the values that support these assumptions?

Looking at the values, what do you conclude is the purpose of a Strategy Focused Organization?

When thinking of a Strategy Focused Organization, what structure comes to mind?

When thinking of a Strategy Focused Organization, what behaviors and actions come to mind?

My working definition for what a Strategy Focused Organization is:

My working definition for what a Strategy Focused Organization is not:

Consider the value of discernment when you carry out your strategic planning work.

Notes:

Learning summary

You have gone through many activities to discern your current understanding about strategic planning and to create baseline measurements. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of what your discernment produced that you feel is important to remember or refer to.

Notes:

Notes:

2. Readiness

Readiness requires patience just at the time that you want to charge ahead with action.

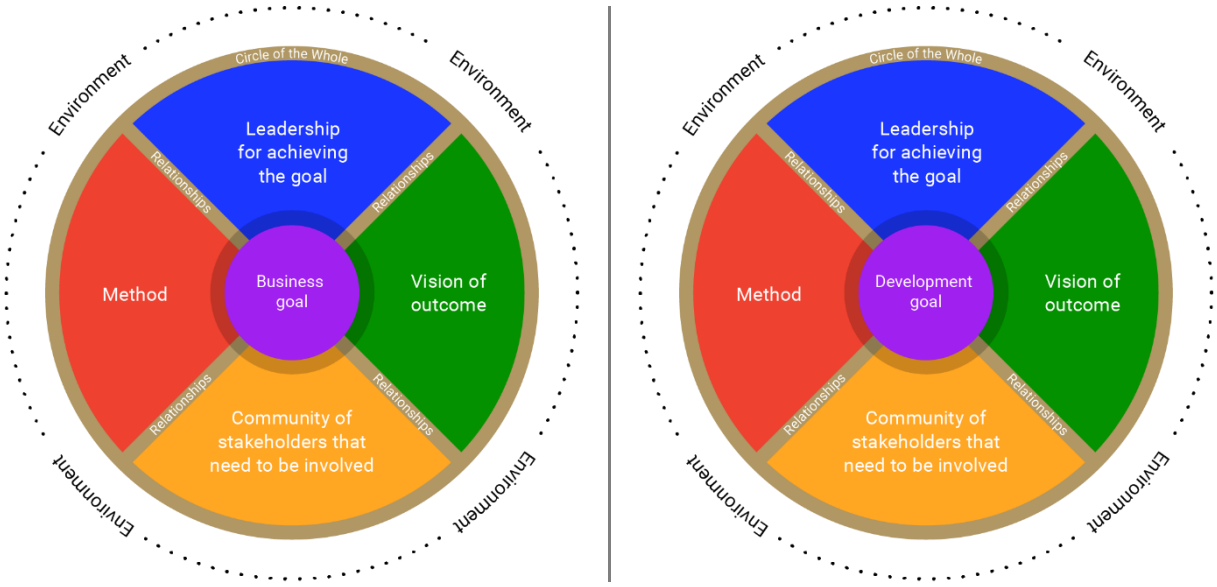
~ Birgitt Williams

Following discernment, it is time for readiness. In this phase, you will have the opportunity to learn what you'll need to do to ensure sufficient readiness in an organization for strategic planning. You'll be guided in developing a readiness checklist complete with actions that you can take towards readiness for the strategic planning.

Holistic perspective to strategic planning

The first step in Readiness, once having done the discernment work, is to develop a holistic perspective to strategic planning. The whole, quoting from Einstein, is greater than the sum of the parts. The Service Delivery Model (SDM) is the Genuine Contact tool that is most useful as a step in working on readiness from a holistic perspective.

There are two versions of the Service Delivery Model, one with business goal in the center, and one with development goal in the center.



There is value in understanding strategic planning through the lens of each of the two models. It is best to work with the SDM with business goal in the center first, and then work with the SDM with development goal in the center. The same questions are asked as you work through each of the two models. When you are complete, notice if there is a difference, even if only a slight difference, in your answers.

These simple questions will provide you with the insight you need about readiness:

1. What is the goal of strategic planning (development goal in one model, business goal in the other, both will be slightly different)?
2. What do you know about leadership for achieving the goal?
3. What are the expected outcomes of strategic planning (how are they different, even if only slightly, when working a business goal or a development goal)?
4. Who is the community of stakeholders that need to be involved? Hint: who is responsible for implementing the plan?
5. What do you know about the readiness of the organization to implement a strategy focused culture? What needs to be considered in the method for readiness for a strategy focused culture?

Examples of a business goal are to increase revenue, increase market share, increase impact, or increase long term community benefit. Examples of a development goal are to grow our capacity to meet our social responsibility, to develop leadership in our people, develop

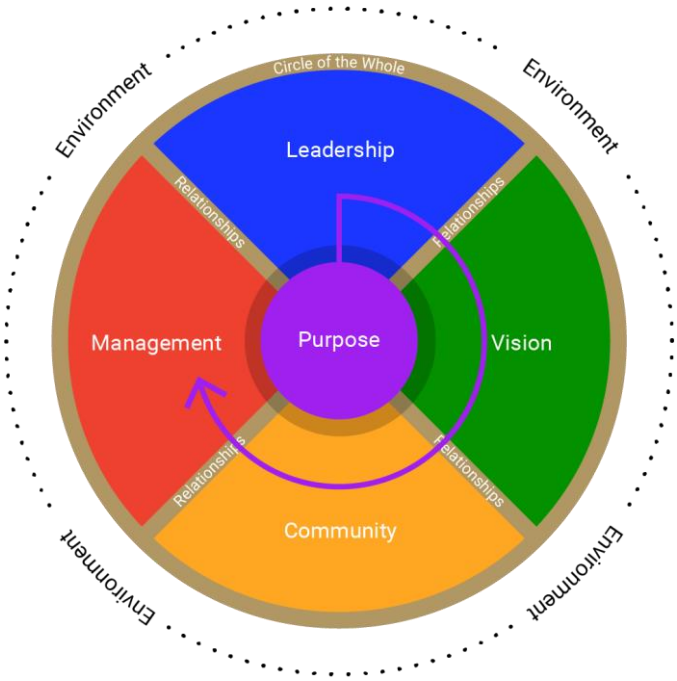
ourselves to be agile individually and as an organization, or increase capacity of our organization to excel.

This has been a simple exploration of readiness from a holistic perspective. You have gleaned important information about what needs to be considered.

Notes:

Map out a plan for readiness

What do you do with this information? The next step is to use the Medicine Wheel Tool (MWT) to map out a plan for achieving readiness in the organization, the readiness that is needed for strategic planning to have its best chance of successful implantation.



Keeping in mind what you learned when working through the 2 versions of the SDM, questions to ask as you work through the MWT are:

1. What needs to be done to assist the people in the organization to understand the purpose of doing this strategic planning work?
2. What needs to be done to assure that there is leadership for the formulation of the strategies and what needs to be done to assure that there is leadership for implementation of the strategies?
3. What needs to be done to assist the people in the organization understand the expected outcomes from the strategic planning work, the vision of what strategic planning can accomplish?
4. Who needs to be invited for successful formulation of strategies and for successful implementation, the community of stakeholders?
5. What do you currently know about what needs to be managed to achieve readiness of the organization for strategic planning work?

Notes:

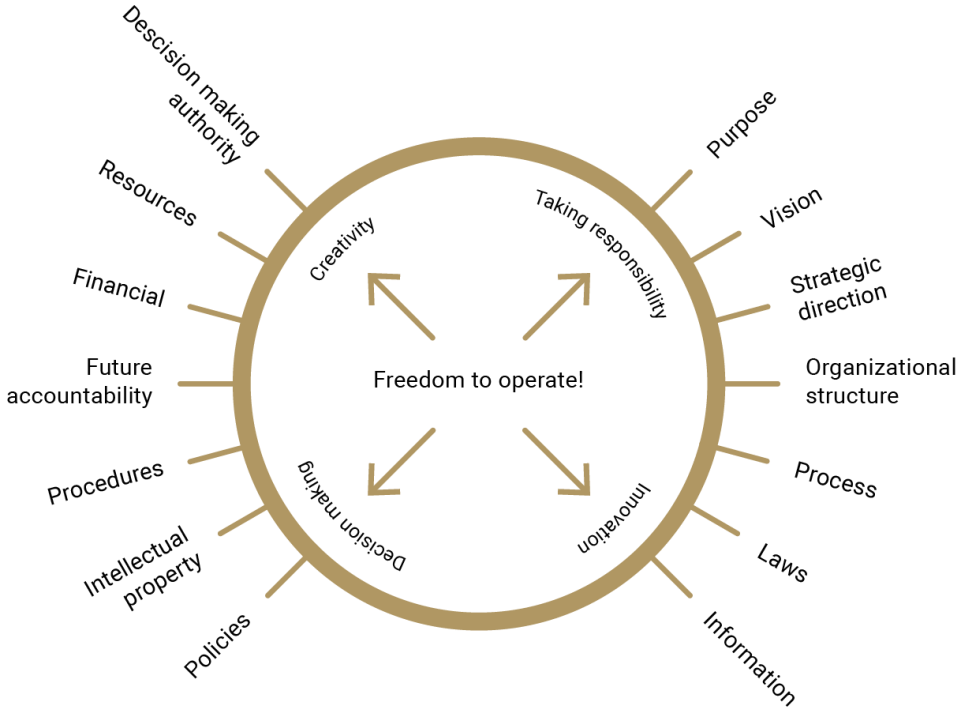
Defining the expectation zone

During the readiness stage, formal leaders need to define the expectation zone within which the strategic planning will take place. This expectation zone is defined by developing clarity about the givens, about what is not negotiable in the organization.

People do amazing work within this expectation zone when it is made clear to them. They better understand the space that is created, the space for creative thinking, innovation, solutions, collaborations. When they understand what is not negotiable, simultaneously this defines the space that is open. Sometimes the space is very small, sometimes it is quite big, and of course everything in between. This gives definition to the expectation zone. What is vital and non-negotiable.

Clarifying the givens clarifies the expectation zone. Within this expectation zone, the participants in a process have the experience of maximum choice, maximum freedom. Maximum choice, maximum freedom is a principle of the Genuine Contact Way of working. What this means to us is that we work to clarify the givens, to clarify the expectation zone to open up as much space as possible in the process for people to do their best with what they bring of themselves, their knowledge, their creativity, their innovative approaches, their best contributions.

With the givens noted explicitly, people no longer restrict their contributions due to assumptions that the contributions aren't wanted or aren't possible to achieve. With the givens noted explicitly, people no longer waste energy developing solutions for what was non-negotiable and could use their energy within the zone created for their contributions.



We offer you a look at the categories of givens that are most frequently considered:

- **Purpose**: is the purpose of the organization a given, or can it be changed? Hint: it is usually a given that the purpose is not open for change at this time. If the current purpose is a given, include it in the statement of this given so that it is clearly communicated as part of the given.
- **Vision**: is the current vision of the organization a given, or can it be changed? Hint: It also is usually a given that the vision is not open for change at this time. If the current vision is a given, include it in the statement of this given so that it is clearly communicated as part of the given.
- **Strategic Directions**: are the current strategic directions a given, or are they open to be changed? Hint: in a strategic planning process, they are usually open for change. If the current strategic directions are a given, include them in the statement of this given so that it is clearly communicated as part of the given.
- **Organizational Structure**: is the current organizational structure non-negotiable or is it open for change? When an organization is growing and when it is declining, there is always a desire and need to alter the structure so that structure supports function. If the strategic planning includes the need to change the organizational structure, is the organizational structure open for change or is it not open for change? It is valuable to include a reference such as a URL of the current organizational structure diagram.
- **Process**: are existing processes non-negotiable or are they open for change? Usually, existing processes are open for change. Hint: a process is a set of steps with a start and a finish that can be mapped out. It is valuable to include a reference such as a URL to identify where the existing processes can be found.
- **Laws**: are existing laws a given or is it a given that whatever is agreed to in the strategic planning can lie in working to change existing laws, that the organization will advocate for change to laws? Hint: usually existing laws are a given
- **Policies**: are existing policies open for change or are they a given? Hint: policies are a documented set of rules or ideas about what should be done in particular situations. Policies are agreed to by governing bodies, decision makers in organizations. It is valuable to include a reference such as a URL to identify where current policies can be found.
- **Intellectual Property**: what is the given or non-negotiable pertaining to intellectual property? Many companies have strict givens regarding intellectual property that employees must adhere to. It is valuable to include a reference such as a URL to identify where the current guidelines for intellectual property can be found.
- **Procedures**: are existing procedures open for change or are they a given? Hint: a procedure is usually captured in documentation about how processes are to be carried out to achieve the end goal. Procedures can take the form of guidelines, unlike processes that take the form of steps. It is valuable to include a reference such as a URL to identify where the current procedures can be found.
- **Future Accountability**: what is the given regarding future accountability in relation to the outcomes of the strategic planning process?
- **Financial**: what are the givens regarding whether there are finances outside of the existing budget to support the desired actions that are formulated in the strategic plan,

or does everything that people come up with need to be done within the existing budget? It is valuable to include a reference such as a URL to identify where the current budget can be found.

- **Resources**: what are the givens regarding the resources that can be used to carry out any actions that are formulated during the strategic planning process? Can resources be deployed differently? Can resources be increased?
- **Decision Making Authority**: who has decision making authority for the actions formulated during the strategic planning process? Will decision making be by the group of people who create the plan, by a senior leadership team, a Board of Directors? Will the decision making be done during the strategic planning process or after the strategic plan is complete and if so when can the decision making be expected? If the organization has a chosen decision making model or process, it is valuable to provide a reference such as a URL to identify where the decision making model or process can be found.

Practice with the 'Givens'. Think of an organization that you are familiar with. Go through the categories of givens one by one, giving thought to what that organization would likely state as a given in that category when heading into a strategic planning process. Formulate the given succinctly so that it can be easily communicated and understood.

Notes:

The foundation of the organization

Elements in the foundation of the organization include its purpose, leadership model, vision, community of stakeholders, and management. You will note that in the foundational components of the organization there is a separation of the function of leadership and the function of management. Leadership leads people and creates change; management is about creating stability and order through systems and resource utilization.

A healthy foundation includes clear values, clearly stated assumptions upon which operating decisions are made, and a structure that aligns behaviors and actions to the purpose and values of the organization.

All these elements affect the culture of wellness of the organization and support a culture of development, a culture of service, a culture of accountability, a culture of leadership and of course the strategy focused culture. Think of different dimensions of an organization, of different textures of an organization, all related and interconnected. All rely on a strong foundation.

During the work on the givens, it may become clear that the foundational elements are missing or need to be further developed or clarified.

One option for the leadership team is to choose to work to strengthen the foundational elements before proceeding with strategic planning. A second option is to create a strategic plan based on what is known and developed to this point, ensuring that it is noted in the givens that the foundational elements are open for change.

For successful plan implementation, the foundational elements will need to be strong to support the strategy focused culture or be strengthened early in the strategic plan implementation.

If you need to acquire knowledge about developing the foundational elements in an organization, the Achieving and Regenerating Organizational Health and Balance module of the Genuine Contact program is recommended to you.

Learning summary

You have gone through many activities to understand the value of readiness when you carry out strategic planning work. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of this work with readiness for strategic planning that you feel is important to remember or refer to.

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3. Engagement

Gone are the days when people's engagement came about from a motivational speaker. Today, people engage when they are included.

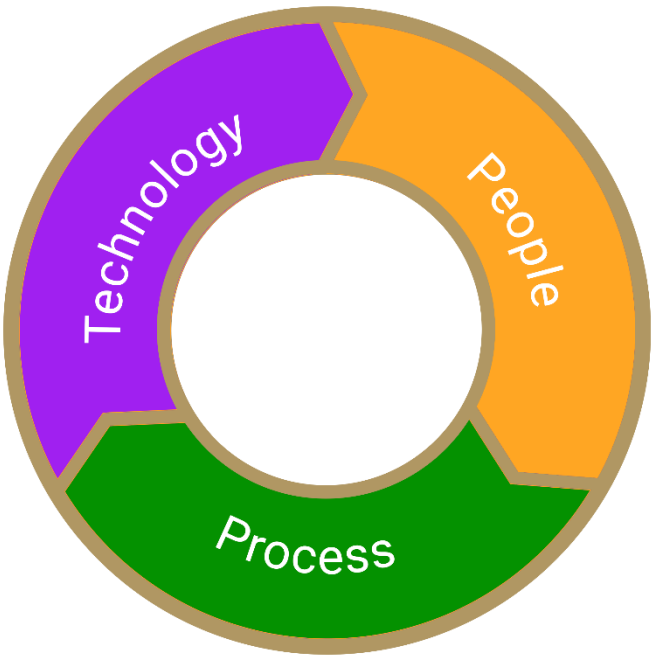
~ Birgitt Williams

You will be taken through a series of activities to engage you with the art of strategic planning. You'll increase your confidence and capacity for leading strategic planning and working with the strategy focused culture. In this phase, you will learn the tools that you will be using during construction of your plan. You'll come to a new understanding of working with the weaving together of people with process with strategic planning technology.

Artfully weaving people, process, and technology

You are invited to think about strategic planning as an art, with success achieved through artful weaving of people with process and technology. Moving forward with strategic planning requires that people feel engaged in the strategic planning. A step in assisting people to feel engaged is to orient them to the process that will be used during the strategic planning, emphasizing that the process used is participatory. A process in which they all contribute. Another step in assisting people to feel engaged is to orient them to the strategic planning technology to be used, offering the perspective that documentation of the parts of the social planning technology can be presented as a roadmap. People engage better with strategic planning when they know that they will contribute, and when they have the reassurance that there is a roadmap.

How would you engage people in your strategic planning process, artfully weaving people with process and strategic planning technology? Make a plan for engagement using the information presented in this chapter.



Strategic planning technology

The technology being referred to here is the technology of strategic planning. The technology includes consideration for:

- Strategy formulation: how high-level strategies are developed for the organization
- Strategy focused culture: aligning the work of the organization to implementing the strategy

Technology for Strategy Formulation

There is no one specific technology that we recommend for strategy formulation. As you develop the high level strategies, you need to use a technology to capture ideas, generate themes, and determine priorities. Once the priorities are understood, each strategy needs to be written in a way that is simple to communicate and to understand. There are usually 4-5 high level strategies.

One consistent technology we use in our work with strategy formulation is from Blue Ocean Strategy Canvas by W. Chan Kim and Renée Mauborgne.

We map ideas that are generated into four categories: what needs to be Eliminated, Reduced, Increased and Created. We refer to this as the ERIC model. Separating the ideas into these four categories provides added information when looking at the results to group the ideas into themes.

ERIC aligns with the importance in strategy formulation of choosing what to do, and simultaneously what not to do.

Technology for the Strategy Focused Culture or Organization

At its core, the Strategy Focused Organization puts strategy at the center of the organization's key management processes and systems. All aspects of the organization can be justified in relation to implementing the strategies. In other words, there are no aspects of the organization that are not linked to implementing the chosen strategies.

The primary researchers about the technology of the Strategy Focused Organization are Robert S. Kaplan and David P. Norton of Harvard. Their very important contribution to strategic planning technology is recognizing the gap between high level strategies and creating an operational plan. They recognized the need for a bridge between the high-level plans and operational planning for the purpose of being able to translate the high-level strategies into operations, into implementation.

Prior to their groundbreaking work, it was common to attempt to craft an operational plan after the development of the high-level strategic plan was done. This was an almost impossible task in relation to developing the operational plan in a way that supported successful implementation of the strategic plan. We incorporated their strategy mapping into Strategic Planning the Genuine Contact Way. Strategy Mapping is essential to the Strategy Focused Organization.

Developing the Strategy Map, as summarized on the following page, is different for the private sector than it is for the public sector. In the private sector, the focus of the organization is on productivity and growth to improve the organization's finances. In the public sector, the focus of the organization is on productivity and growth to improve the long-term community value the organization delivers.

Whether developing the Strategy Map for a public or private type organization, each map includes layers that describe the connecting elements between high level strategies and plan implementation.

Construct the Map: Private Sector

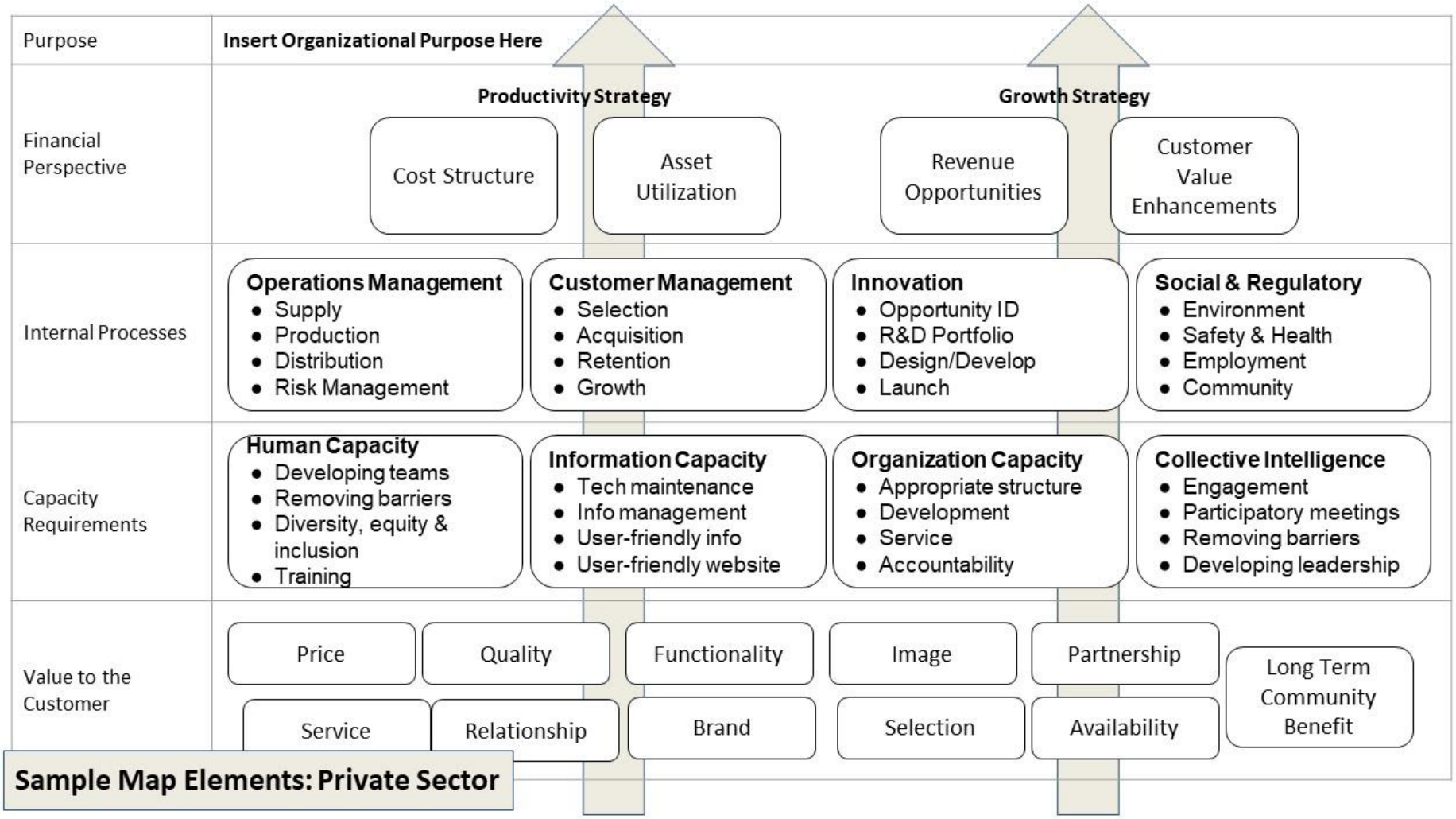
When constructing the Strategy Map for a private type company, the following layers are developed:

- Identify the desired long-term company value.
- From the financial perspective, identify themes for productivity strategy and growth strategy.
- From the customer perspective, identify how the organization will create real value for customers and how to achieve the long-term company value, productivity strategy and growth strategy.
- From the internal processes perspective, identify the critical work processes needed to achieve value for customers.
- From the capacity perspective, identify what needs to be done regarding human capital, information capital, organization capital and collective intelligence capital. For the critical work processes to be done effectively.

Details for developing the content of these layers are found on the following page.

Generic Map Elements: Private Sector

A generic sample of a one-page strategy map for a private type company is found on the following page. It includes all the layers created when developing the strategy map on one page for easy reference.



Sample Map Elements: Private Sector

Developing a Private Sector Strategy Map

Financial Perspective: Begin by clarifying what the financial perspective is by focusing on long-term company value and the strategies to achieve that value.

Customer Perspective: It is essential to develop clarity about who the customer of the organization is prior to working through what value the customer is going to get from the organization. Once this is done, strategic themes develop from the customer perspective regarding the value that the customer would want to get from the organization.

Internal Processes: Effective and aligned internal processes determine how the customer value gets created and sustained. Internal processes can generally be clustered into four buckets:

- **Operations management**: Producing and delivering services to customers. Examples of operations management processes include develop supplier relationships; produce services; manage risk
- **Customer management**: Establishing and leveraging relationships with customers. Examples of customer management processes include retain customers; deepen and grow customer relationships
- **Innovation**: Developing new services, processes and relationships. Examples of innovation processes include identify new opportunities; select projects; launch new services
- **Regulatory/Social**: Conforming to regulations and societal expectations and building stronger communities. Examples of regulatory and social processes include improve environmental, health and safety performance; follow excellent employment practices; enhance communities

Each bucket delivers value at different points in time. Operations management delivers value in the short-term as costs are reduced. Customer management value usually occurs 6-12 months after improvements are made. Innovation and regulatory improvements deliver value even further into the future.

Within these buckets are hundreds of sub-processes. The organization must focus on the critical few internal processes that deliver the real value and are most critical for enhancing productivity and maintaining the organization's mandate to operate.

The key questions to frame the identification of the right Internal Processes to work on is "What do we need to do internally to achieve the right customer value?" and "To satisfy our customers, what processes must we excel at?"

The focus needs to be on internal processes that deliver the real value and not the ones that so many organizations get into that: 1) are done because they've always been done; 2) make busy work that seems urgent but is really not important when it comes to real value or 3) are someone else's best practices but don't provide real value to your organization. At this stage, it is important to focus on identifying the internal processes that add real value, that enhance productivity in relation to the real value, and that maintain the organization's systems in a way that achieves peak performance.

Capacity: When you work on capacity, you will be working on four dimensions of capacity considered to be intangible assets:

- **Human Capacity**: Identify the capacity that is present in the organization. Then identify what is missing. What needs to be done to strengthen the human capacity of the organization?
- **Information Capacity**: Key questions are ""What analysis, interpretation, and information sharing is required?", "What key transactions are (or will) be enabled by IT systems?", "What databases and information sources are most important?", "What IT capacity is needed?
- **Organization Capacity** Key question "How do we need to be organized to achieve our strategic themes effectively?"
- **Collective Intelligence Capacity** Key questions are "What benefit could we achieve from working with our collective intelligence?", "What is the required collective intelligence?" and "What do we need to do to grow, spread, or preserve the required collective intelligence?"

Notes:

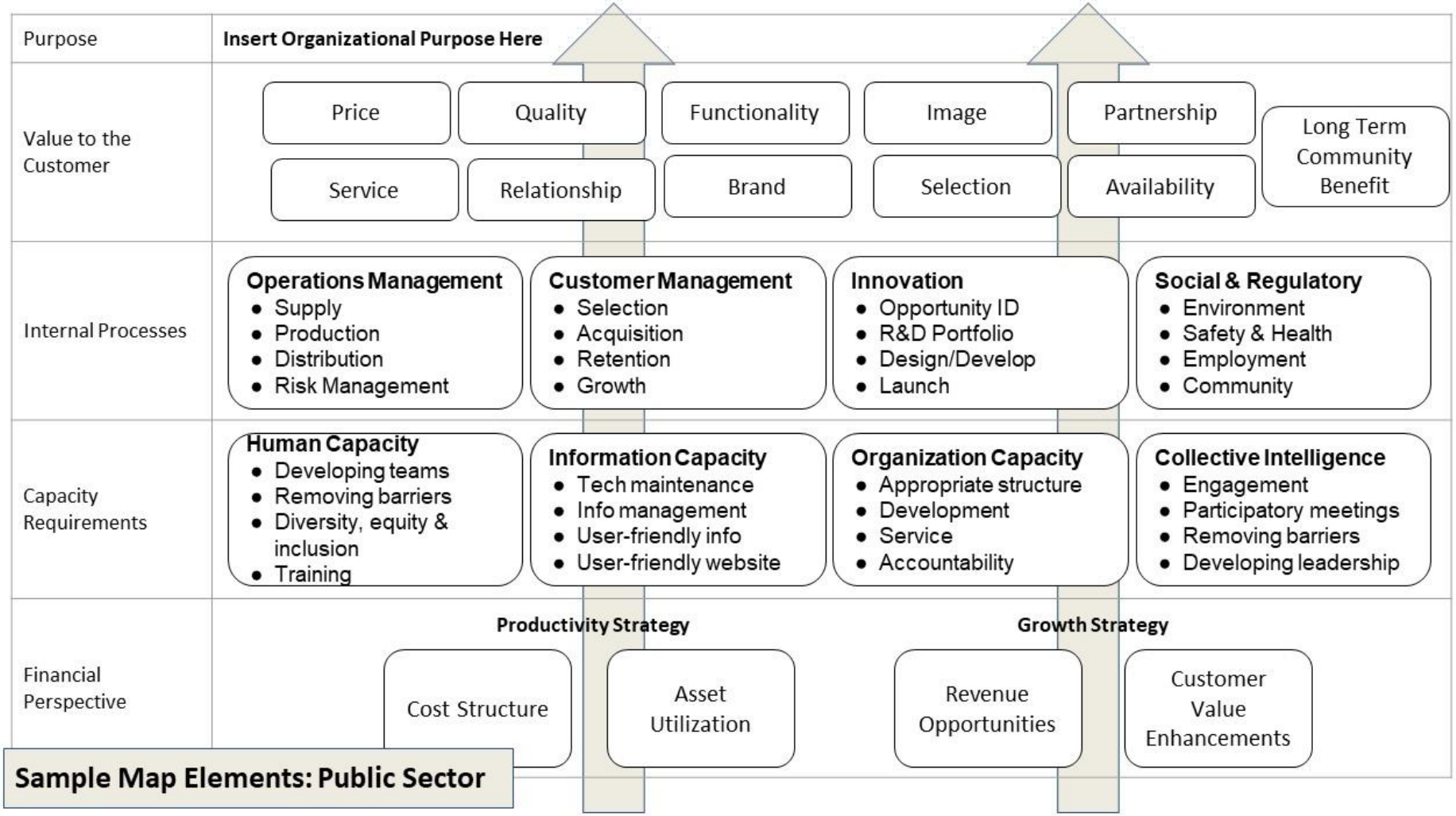
Construct the Map: Public Sector

When constructing the Strategy Map for a public type organization, the following layers are developed:

- Identify how the community will benefit from the service in the long term.
- Identify and get agreement on who the organizations' customers are.
- From the customer perspective, identify how the organization will create real value for customers and how to achieve long-term community benefit.
- From the internal processes perspective, identify the critical work processes needed to achieve value for customers…
- From the capacity perspective, identify what needs to be done regarding human capital, information capital, organization capital and collective intelligence capital for the critical work processes to achieve value for customers.
- Where are the finances coming from that are needed to achieve real value for customers and thus the community?

Details for developing the content of these layers are found on the following page.

Generic Map Elements: Public Sector



Sample Map Elements: Public Sector

Developing a Public Sector Strategy Map

Customer Value: It is essential to develop clarity about who the customer of the organization is prior to working through what value the customer is going to get from the organization. Once this is done, strategic themes develop from the customer perspective regarding the value that the customer will get from the organization for a greater and long-term community benefit. What is to be achieved and for whom?

Internal Processes: Effective and aligned internal processes determine how the customer value gets created and sustained. Internal processes can generally be clustered into four buckets:

- **Operations management**: Producing and delivering services to customers. Examples of operations management processes include develop supplier relationships; produce services; manage risk
- **Customer management**: Establishing and leveraging relationships with customers. Examples of customer management processes include retain customers; deepen and grow customer relationships
- **Innovation**: Developing new services, processes and relationships. Examples of innovation processes include identify new opportunities; select projects; launch new services
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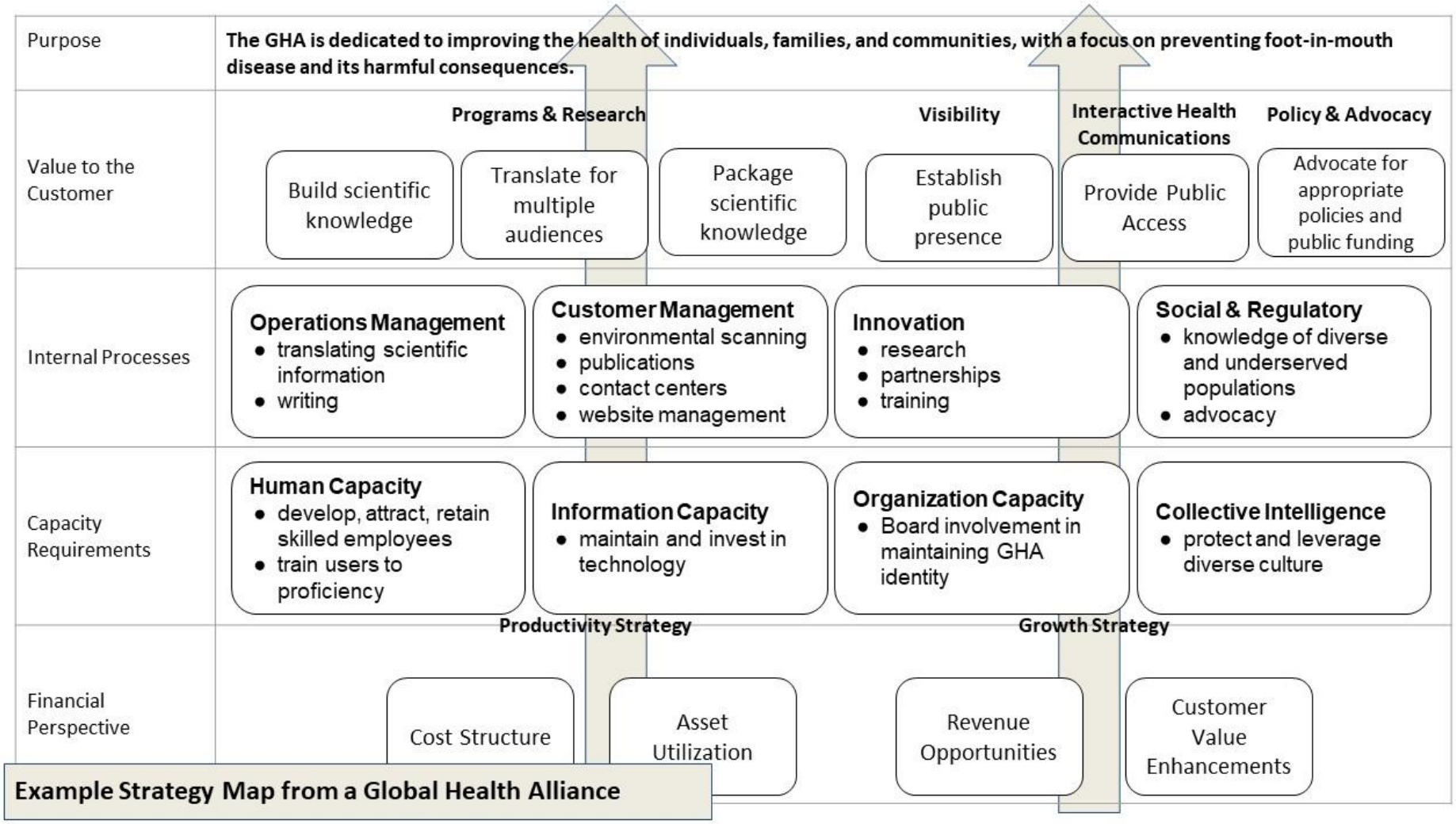
- **Collective Intelligence Capacity** Key questions are "What benefit could we achieve from working with our collective intelligence?", "What is the required collective intelligence?" and "What do we need to do to grow, spread, or preserve the required collective intelligence?"

Financial Sustainability: The final category of the Strategy Map is financial sustainability. Is financial stability guaranteed by government or other sources, or are strategies needed to supplement the primary sources?

Notes:

Example strategy map from Global Health Alliance



Example Strategy Map from a Global Health Alliance

Construct the implementation blueprint for the whole organization

Whether developing a strategy map for a private or public type organization, the next step in strategy mapping that follows the creation of both the high-level strategies and the strategy map is the construction of how to implement the plan, referred to as the Implementation Blueprint. For the organization as a whole, translate the high-level strategy map into:

- Objectives
- Target measures including identification of indicators that will be used in measurement
- Milestones
- Initiatives and activities
- Resources needed

Example implementation blueprint

This example focuses separately on each of the 4-5 Strategic Themes (Strategic Directions): Internal Product Development.

	From Strategy Map	What to Monitor			Action Plan	
		Objective	Measure	Target	Initiative	Budget
Financial Perspective	Revenue growth	Grow revenue from new products	Percentage revenue from new product	30%	xyz xyz	$$$
Customer Perspective	Innovative products	Satisfy needs for state-of-the-art capabilities	Share of account	40%	User group conference	$$$
Internal Processes	World class internal product development	Accelerate new product development	Time to market	9 months	Reengineer development cycle	$$$
Capacity	Stable high-talent workforce	Acquire, develop, retain skill	Key staff retention	95%	Supervise training Benefits program	$$$

Many apps and programs have been developed to support organizations in developing their implementation blueprint and monitoring progress over time. In Genuine Contact Way Strategic Planning, it is important to choose one that includes visualizing a connection between the high-level objectives of the strategy map and the operational plan for achieving the work.

Notes:

From the Organizational Whole to the Business Units

When the Strategy Map and its accompanying implementation blueprint is complete, the business units must develop their own strategy maps that align the work of the business unit to achieving the organization's Strategy Map. Every business unit replicates the strategy mapping and implementation blueprint process.

For the business units, the customer is the organization as a whole. It is helpful if there are work plans and work planning processes in place, for the business units to also break down the existing workplan and incorporate the items into the strategy map. Doing this will assist the business units to identify how the work plan aligns with the strategy map, and what is missing that needs to be added. The strategy map is usually much more robust than existing work plans.

Notes:

People

Successful implementation of strategic plans ultimately depends on the peoples' willingness, capability, and inspiration to carry out their targets and goals in the plan. Successful implementation of strategic planning rises or falls based on people.

Genuine Contact Way Strategic Planning is designed to bring your people with you through the construction and implementation of the plan. Through Genuine Contact Way Strategy Mapping, we avoid the trap of having to "sell" the plan to people after its construction. Through this process, your people will have:

- data so they can be good contributors
- opportunities to share their best ideas
- forums through which innovation, both individuals and collective, will soar
- ownership for successful implementation during construction of the Strategy Map
- understanding of how the strategy map applies to their job so that they are poised to adjust to align their work with the targets and meta goals of the strategic plan
- understanding of managing performance through meeting targets in the strategic plan

In addition, it is a very effective practice to establish a Strategic Plan Navigation Coordinating Team. This team of 10-15 people should be made up of a few people outside the formal leadership team who can speak for important components of the organization. Their purpose is to guide the construction of the plan and to monitor the quality of implementation, working closely with the leadership team. They become a powerful guiding coalition that can keep the formal leaders plugged into organizational realities and counterbalance political forces.

Data to be good contributors

Gone are the days when strategic planning was left in the hands of the executives and managers of an organization. Strategic planning, done by executives and managers and later 'sold' to the people run into significant problems in implementation; in fact, according to Norton and Kaplan in Strategy Maps, 70-90% of strategic plans fail to get executed[1]. A challenge that must be overcome is to get sufficient data about the organization, its challenges, and its opportunities into the hands of all the people who will be a part of the implementation – all the people working in the organization. People must be equally equipped with data, so they can be good contributors. In going through the data of any organization, the data that must be kept to the executive level only is very limited; this means that a great amount of data of the running of an organization can be shared.

It is the responsibility of the executive to make the data available and the responsibility of the people to educate themselves as early in the strategic planning process as possible. In sharing the data, the executives need to set the context for the data and provide information about why the data is important to encourage the people to integrate the data for themselves.

Genuine Contact Way Strategic Planning guides executives to provide the data required and to set the context for learning by the people throughout the process. It is beneficial to an

[1] Strategy Maps

organization to maintain this as an ongoing practice rather than just during the dedicated strategic planning time. It is beneficial because it is one of the ingredients in creating the conditions for people to provide their best ideas towards organizational success.

Opportunities to share their best ideas

The best ideas of the workforce in most organizations are never heard in the organization itself. The organization loses out. People often go home from their day at work and tell their ideas to their families over the supper table, often beginning with 'if my boss would only listen to me, we could get twice as much done…' At other times, the ideas are shared in the cafeteria or in the parking lot. Thus, it is important to create opportunities for people to share their best ideas including the opportunity for them to bounce their ideas off of each other to stimulate the greatest likelihood of the best solutions.

Genuine Contact Way Strategic Planning guides executives in fostering the conditions for these opportunities. This requires working with the executives to create the conditions and working with the people to make use of the opportunities.

Fostering the conditions that provide the opportunity for sharing the best ideas is also a good and recommended ongoing practice because it is one of the ingredients in creating the conditions for people to provide their best ideas towards organizational success.

Forums through which innovation will soar

Beginning in the late 1980s and into the 90s, organizational development work evolved to an understanding of the benefits of creating forums in which a maximum mix of a whole system could meet together. Currently, the best summary of these forums is available in The Change Handbook[2]. Participation in whole system forums garners innovative thinking that can take a company from good to great.

Genuine Contact Way Strategic Planning offers the opportunity for the people of the organization to come together in whole system meetings and teaches executives and managers when to use them in the planning process.

Ownership of successful implementation during the strategic planning

Strategic Planning is not a time limited exercise or event. Rather strategizing, and aligning to the strategy, is a constant leadership discipline in an organization that involves:

- development of an initial plan
- monitoring and evaluating the effects of the implementation
- always celebrating achievements or making constant adjustments and reorienting based on the evaluation.

The organization aligns its energy, activities, and decision making in accordance with the strategic plan, while also constantly scanning the external environment. As adjustments are

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[2] Holman, P. Devane, T. and Cady, S. *The Change Handbook: The Definitive Resource on Today's Best Methods for Engaging Whole Systems, Second Edition. CA, USA:* Berrett-Koehler Publishers, 2007.

made, the plan becomes a living document. Learning and leadership become linked, and work is focused on the delivery of the goals of the plan. Over time, little activity within the organization is outside of what is contained in the plan and the organization is able to respond to change quickly and effectively.

The means by which a strategy map is constructed in Genuine Contact Way Strategic Planning provides the greatest opportunity for people to claim ownership for successful implementation of the plan. People are inspired to help the company achieve its strategic goals when they understand the environmental challenges and the organization's direction and goals. Keeping people involved in dialogue about potential issues and opportunities as a regular part of strategizing and aligning ensures ongoing ownership. Ongoing employee dialogue is beneficial to the leadership team and is a primary vehicle for rewiring the culture to support the organization's direction.

Develop an understanding of how the strategic plan applies to their job

During the construction phase, work teams have an opportunity to develop an understanding of how the organization-wide strategy map applies to their function so that they can align their team's targets to the bigger plan. Teams can also understand their interdependencies so as to improve collaboration and communication.

Understanding of managing performance through meeting targets in the strategic plan

Genuine Contact Way Strategy Mapping includes building in accountability for meeting targets within the plan. People develop an understanding of the monitoring and evaluation function. They develop an understanding that performance management is tied to these targets and their role in fulfilling them. In fact, performance management is directly tied to fulfilling the strategic plan with the success of whole teams achieving their targets being seen to link directly with the organization wide goals.

We guide executives and managers to understand that performance management is linked to the successful implementation of the plan, including its ongoing adjustments, and not separate from it.

Notes:

Process

It is necessary to determine how the strategic planning process is going to be managed for maximum involvement of the people. Opportunities are provided for all people within the organization to participate in discussion and integration of the information developed so that they have the opportunity to personally identify with the purpose for strategy mapping and its expected outcome.

Highly participatory processes are used to weave the people together with the technology to produce extraordinary results. The Change Handbook[3] is a good compendium of credible, available participatory processes. The primary meeting methodologies that we use are Open Space Technology when a truly open participative meeting process is suitable and Whole Person Process Facilitation when a more guided approach is needed. Both are congruent in approach, so they also work well in tandem. Often a Whole Person Process Facilitated meeting precedes the Open Space Technology meeting to prepare for the Open Space Technology meeting. Often a Whole Person Process Facilitated meeting follows the Open Space Technology meeting to assist in implementation. In the Genuine Contact Way Strategy Mapping, we make use of these two processes as well as one with one interviews and build in celebrations for progress made.

Whole Person Process Facilitation

Meetings that produce results by tapping into the creativity and collective genius of the people Whole Person Process Facilitation (WPPF) creates meetings that produce results by tapping into the creativity and collective genius of the people in your organization. It is both a method of facilitation and an operating platform for the meeting that allows for the embedded use of other means of facilitation. Quite often, a short Open Space Technology meeting is embedded within a WPPF meeting.

There are many things to pay attention to in ensuring good group process facilitation. We deliver those things and then go beyond them, recognizing the unseen world of intuitive knowledge, including the collective consciousness, as valuable assets for any organization to work from. WPPF works well with groups of 6-150 people and from 3 hours in length to several days.

There are theories and frameworks covering each of the components, including those regarding energy work and working with intuition. We have chosen theories and frameworks that we have found to work in enabling consistent learning results in adults and what many who work with us say is like "magic". What we offer here is not the "only way". Its usefulness is that it works, has a good track record, is transferable to any situation, and is duplicable and simple. Meetings of any kind are useful only if learning is taking place. There is certainly preparation required. Our promise to you is that through this way of facilitating process, learning is enhanced, potential is tapped into that has lain dormant, and in the end, it takes less time and time is used more effectively. The group benefits and achieves outcomes, usually beyond their expectations.

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[3] Holman, P. Devane, T. and Cady, S. *The Change Handbook: The Definitive Resource on Today's Best Methods for Engaging Whole Systems. CA, USA:* Berrett-Koehler Publishers, 2007.

In using WPPF, the components that are attended to in designing the meeting include:

- Creating an accepting rather than defensive climate. Placement of chairs, role of food, other décor, attitude and responses. Being conscious of the implications of actions and behaviors of the facilitator.
- Introductions. The difference between authenticity and icebreakers.
- Hopes and fears as a way of identifying objectives.
- Right placement of your statement of objectives for your meeting/teaching session.
- Adult learning styles using the Learning Style Inventory.
- Right Brain + Left Brain + easily connecting integrated use of the two = whole brain learning and problem solving.
- Intuition.
- Transfer in and bridging exercises.
- Varying the levels the facilitator works on – in front of group, with group, apart from group.
- Maximizing energy of the group by doing activities singularly, in pairs, triads, fours, whole group. How and when to use each of these and how to use them to work with each other to keep the energy high.
- Timing
- Attending to the energy of the facilitator and 'taking care' of them
- Working beyond the information that is provided by the five senses and intellectual knowledge
- Feedback tied into hopes and fears. Evaluation that is useful and also part of the ongoing learning experience.

Guiding questions that we ask ourselves when designing and conducting a process facilitated meeting include:

- Do we have a way of introductions that already taps into whole brain thinking so that we can get the "whole person", including brain and heart, into the room quickly?
- Have we given people a chance to express hopes and fears, identifying their right to have emotions in the meeting?
- Have we created opportunities for intuitive knowledge to be expressed?
- Food!
- Environment!
- Are we attending to creating a life-nourishing rather than life-depleting climate - are we doing our own inner work on ourselves in "parking our baggage at the door" and placing our attention to what takes place in our session together?
- Preparation is more than content. It is self. Have we prepared both ourselves and the content?

- Have we created opportunities for all learning styles to benefit?
- Have we kept things simple in structure to allow for maximum learning?
- Are our transfer in and bridging exercises good ones for what we are intending to achieve?
- Have we paid attention to the different levels that we work on to facilitate learning - with the group, apart from the group, in front of the group?
- Level of consciousness about our actions/behavior?
- Staggering learning - pacing as an attunement to energy-attention to when work is to be singular, in pairs, triads, fours, and whole group. Is the timing for each component well thought out?
- How have we attended to right brain/left brain learning throughout?
- How have we attended to intuition throughout?

With Whole Person Process Facilitation, we stay with a basic design, but make adjustments as we go in order to meet the needs of the group and to ensure that the group works towards its stated outcomes and objectives.

Whole Person Process Facilitation is equally effective when used on site and online.
Training is available in person or online in learning to facilitate using Whole Person Process Facilitation, a module of the Genuine Contact program.

Open Space Technology

A Meeting Process that Achieves Results and Fosters an Interconnected Learning Organization—the Conscious Open Space Organization

"Open Space Technology" (OST) is the name given to a meeting without a predetermined agenda. Developed in the late 1980's by Harrison Owen of Maryland, U.S.A., this meeting methodology is now used around the world as an effective process for facilitating change in both organizational and community settings.

OST meetings are simple to organize, require very little lead time, are effective for any sized group from seven to one thousand people, are effective for established groups such as corporations, private sector and public sector organizations, government and non-government organizations, coalitions, teams or communities. They enable the building of energy and participation in ways that few other processes do. OST meetings create the conditions for interactive processes that allow leadership to surface naturally.

OST is best used when there is an important issue to be addressed; there is a diversity of people involved; there is complexity; and when decisions need to be made quickly.
OST operates on four principles and one law. Those principles are:

- Whoever comes are the right people. This reinforces that the wisdom to achieve solutions is present in the room and the group is not to worry about who is not present or to panic about who is.
- Whatever happens is the only thing that could have. This keeps the attention on the best possible effort in the present, not worrying about "what we should have done".

- Whenever it starts is the right time. This reminds people that creativity cannot be controlled.
- When it's over, it's over. This encourages people to continue their discussion so long as there is energy for it. Some sessions will finish well within the anticipated time. Others will run longer than the time allotted.

The one law or rule is called The Law of Mobility, also known as The Law of Two Feet. This indicates that people can enter or leave an open space session as they choose. If the session you are in is not meeting your needs for either contributing or learning, go to another one.

So How Does It Work?

An Open Space meeting is announced. Duration is most commonly between one and three days, though they can be shorter.

The venue is a large conference room with lots of "break-out" or session rooms or areas adjacent. When people arrive for the OST meeting, they initially come to the plenary room and find a venue in which there is an empty room, except for a large circle of chairs. The circle is an invitation to communication with no barriers.

The workshop begins with a welcome by the sponsor that is brief, highlighting the theme and the "givens" and then a facilitator who explains how the OST workshop will operate. The broad purpose of the workshop is stated again, as are the "givens" or constraints. An example of a broader theme might be "Issues and Opportunities for the Future of the Organization". Sometimes the broad purpose is quite focused such as "Issues and Opportunities for reworking the assembly line". In the middle of the circle is a collection of newsprint paper, masking tape, and felt pens. Participants are then invited to create the agenda for the workshop. It works like this.

Anyone who has any ideas at all that relate to this broad topic are invited to take a sheet of paper and along the top write their topic of interest or passion. People are asked for ideas for which they have passion and for which they are prepared to take the responsibility of convening a discussion group on that idea (they do not need to have had previous experience in convening a discussion group but simply to get their topic started and to be sure that everyone who comes to their discussion has a chance to speak), and to make sure a record of the discussion is recorded (report forms are provided). The sheets announcing each of the ideas, along with the name of the person who put up the idea and a note of when the topic will be addressed and which breakout area it will be in) are affixed to a blank wall. Participants can put up ideas for which they have a lot of information including having handouts that they have brought to the meeting for the purpose of sharing the information, or they might know nothing more about the idea than to have a question.

The next step involves a "market-place". All workshop participants go to the market wall to look at the ideas outlined on each sheet. When they find the topic of most interest to them, they sign up, by writing their name on the sheet beneath the topic.

The next step involves participants going to the breakout spaces to participate in the topics of their choice. As far as possible, each session is defined by a circle of chairs and no other furniture, though it may have flip charts, post-its, felt pens, etc. The person who posted the idea is responsible for leading the session in whatever way s/he chooses. The facilitator has no

involvement whatsoever. The only requirement is that, at the end of the session, the session leader brings back to a central point a summary of session ideas, and who has agreed to do what. This is to be provided in a somewhat standardized format, usually noted on a pro-forma given to the session leader at the start of their session. It is important to record the highlights of the discussion in such a way that they can be understood by people who were not present.

In meetings where the intention is to move topics to action steps, the facilitator conducts a summarizing session for convergence, prioritizing and action planning, including seeking input on next steps and follow-up. This is a feature of OST meetings that are longer than one day. Open Space Technology has one outstanding characteristic - the generation of energy and commitment. It also has one outstanding enemy - control. It will not work where the energy and commitment generated are not permitted to bear fruit. This is not to suggest that OST is an invitation to anarchy. Far from it. In our Genuine Contact way of working with Open Space Technology, provided the constraints -economic, political, legislative - are recognized and spelled out very clearly at the start, and the areas where discretion and freedom to be creative ('defining the space") are also made clear, OST is proving itself to be a powerful tool for harnessing commitment and responsibility. Several organization-wide OST meetings within a short time frame will start to shift an organizational culture from something that might be de-energized into a more vibrant organic community that is effectively producing results.

Open Space Technology meetings are equally effective whether on site or online.

Training is available in person or online in Working with Open Space Technology, a module of the Genuine Contact program.

One-on-One Interviews

We carry out interviews of 2-3 people from every level of the organization, from suppliers right through to customers for the purpose of putting together baseline data. The baseline data is usually focused on capturing perceptions of how the organization is doing in relation to its purpose. This data is pulled together into a report that is used for information for those developing the high-level strategies. It can also be referenced during the development of the strategy map.

During the interview we ask the following questions and record the key comments in a way that does not identify who made the comments so that the comments can be immediately shared with all participants following the interviews. We categorize the comments into positive, negative, and suggestions as a way of quantifying qualitative data, thereby providing more information for consideration.

- On a scale of 1-7, how would you rate the impact of this organization in fulfilling its purpose? One is low, seven is high.
- Why did you rate it this way?
- Do you have any suggestions?
- Do you have any other comments?
- What would be the best way to measure success in this organization? What would be measured and how?

Celebrations

It is important to include times for celebration in the strategy mapping process. When goals and targets are reached plan time to celebrate with your team, business unit, or organization. Use your imagination. Pull a team together and plan an event.

Learning summary

You have gone through many activities to understand the value of engagement when you carry out strategic planning work. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of the value of engagement that you feel is important to remember or refer to.

Notes:

Notes:

4. Construction

We went slow, so now we can go fast.

~ Rachel Bolton

In this phase, you practice taking a group of people through constructing a strategic plan with the tools and tips you have learned. You'll come through this phase with increased competency in leading an organization through strategic planning. You'll create a presentation to orient team mates to the way you want to do strategic planning, a presentation that will become part of your own toolkit for your work in the future.

Strategic planning toolkit

As you begin construction of the strategic planning process, a wise first step is to assemble your toolkit. You have learned many tools and tips for strategic planning the Genuine Contact Way. Take time to review what you have learned and assemble a toolkit for yourself. Don't concern yourself at this moment with what you will do with those tools. This is a time for assembling them.

One way to approach this is to use index cards (also called recipe cards) and make note of one tool per card. You can then keep those cards in a box and when ready to work with them, bring them out and lay them on a table or the floor to assess what you want to do. You can also use many different software that allows you to create the equivalent of a card or a post it note per tool.

Hint: it is important to document every tool separately so that the tools can be moved around in different configurations as you develop your process design and for various strategic planning assignments.

Notes:

Presenting the strategic planning approach

With the toolkit assembled, the second step in construction is to develop your narrative for presenting your way of doing strategic planning to people in an organization.

People in organizations usually have some prior experience with strategic planning. Their prior experience may differ substantially from what you are proposing. Use the Six Level Evolutionary Spiral as the framework for your narrative. Develop a presentation that will provide a common understanding.

Hint: look at the tools in your Strategic Planning toolbox for clues about what will go into this presentation. You won't end up using all of the tools you identified because your presentation needs to be succinct. At this point in the construction level, complete your presentation including only the discernment, readiness, and engagement levels. These levels include the data people need to be oriented to and ready to engage in the strategic planning process. Be sure to include when and how you will share this presentation with the people in the organization as part of your plan.

Notes:

Medicine Wheel Tool

The third step in construction makes use of the Medicine Wheel Tool as the framework for creating your plan for construction. Imagine that a group you are working with has been taken through discernment, readiness, and engagement with you. It is now time for this group to construct their strategic plan. What would you have them do? Using the eight components in the MWT will assist you in developing your plan. Remember to consider the artful weaving of people, process, and technology.

Notes:

Adding on to the presentation

The fourth step in construction is to add relevant details of how the plan will be created that you have just developed using the Medicine Wheel Tool to your presentation. The people you present to need to be able to understand what your plan is for the construction of their strategic plan. While the plan you developed using the Medicine Wheel Tool is quite robust, the presentation needs only to include relevant details for engaging people in the process and orienting them to what to expect and how their participation matters.

The presentation now includes relevant details for the people of the organization to understand what is being undertaken in the discernment, readiness, engagement, and construction phases of the strategic planning process you have developed.

Strategic planning process

The final step of construction is to lead the organization through the strategic planning process you have developed, artfully weaving people, processes, and technology along the way. Throughout this process, the high-level strategies are developed and the strategy map and whole organization implementation blueprint are created according to your process design.

Notes:

Learning summary

You have gone through many activities to understand the approach to constructing a strategic plan. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of the value of construction that you feel is important to remember or refer to.

Notes:

Notes:

5. Implementation

"People are happier when their work is clearly meaningful."
~ Birgitt Williams

Through role play, you'll have the opportunity in this phase to explore what is necessary for implementation of a strategic plan, exploring obstacles and opportunities. This phase provides clarity about what needs to be put in place for successful implementation of a strategic plan. You will add a presentation about implementation to your toolkit for your work in the future.

Strategy Focused

The strategy focused culture is one dimension of the organization and its development. In the exploration of the foundation of the organization in chapter 2: Readiness, we noted that other dimensions of the organization can be a culture of well-being, a culture of development, a culture of service, a culture of accountability, a culture of leadership, along with the strategy focused culture. These dimensions interact with each other, and ideally are developed to support each other. If the strategy focused culture is desired as dominant, the organization operates as a Strategy Focused Organization.

Operating Matrix

The first step in implementation is to capture what is currently known about progress in the strategy focused culture, in relation to the development of the whole organization. To assist with this, we have developed and make use of the Operating Matrix.

The Operating Matrix is an orienting framework for people working within an organization. It also supports onboarding key partners and community stakeholders to the organization.

The Operating Matrix:

- Provides documentation of the foundational blueprint of the organization
- brings foundational information together in one cohesive, easily accessible whole
- describes what is true and known in the organization at this time and provides guidance on how the organization can continue to develop while achieving its operational goals
- a living/organic source document that should be reviewed and updated on a regular basis (at least annually) to ensure accuracy as the organization continually develops and achieves its work

Why use an Operating Matrix?

The development and evolutionary path of a complex organic system can be greatly assisted by using this operating matrix document as a living source document, with updates based on development, monitoring and adjustment over time.

- Exists to anchor individual, team, and organizational decisions and actions to the chosen purpose, vision, values and strategies
- Provides important linkages between strategies and operational planning
- Provides a comprehensive, logically laid out organizational development plan as an important platform in priority setting, decision making and performance management
- Provides a clear picture of organizational development for staff orientation

The key foundational aspects of the organization described in the Operating Matrix are documented through the development lens of the culture of the organization and considerations for the environment within which it operates. While each organization has its own approach to its culture, the Operating Matrix makes use of 6 cultures that commonly exist in all organizations. Each lens forms one chapter of the Operating Matrix:

- **Performance Environment**: the organization exists in an environment that it is expected to perform within. Awareness of relevant factors about this performance environment and recognition of when/how the environment is changing are necessary for success.
- **Culture of Development**: supports individual development, leadership development, team development, and development of the organization as a whole.
- Culture of Well-Being: people require a culture of well-being to sustain peak performance and their own happiness at work.
- **Culture of Service**: people require a culture of service to sustain focus on meeting the needs of the primary client and the many beneficiaries of the work and impact of the organization.
- **Strategy Focused Culture**: high-level strategies are clear and consistently worked towards while capacity and processes are continuously developed to achieve these strategies.
- **Culture of Accountability**: ensure that the way the culture of accountability is enacted is in the best interests of the organization and its outcomes, aligning accountability with authority and responsibility.
- **Culture of Leadership**: working with a leadership approach that focuses on leading so people in the organization will take leadership for their own activities, rather than leading so people will follow.

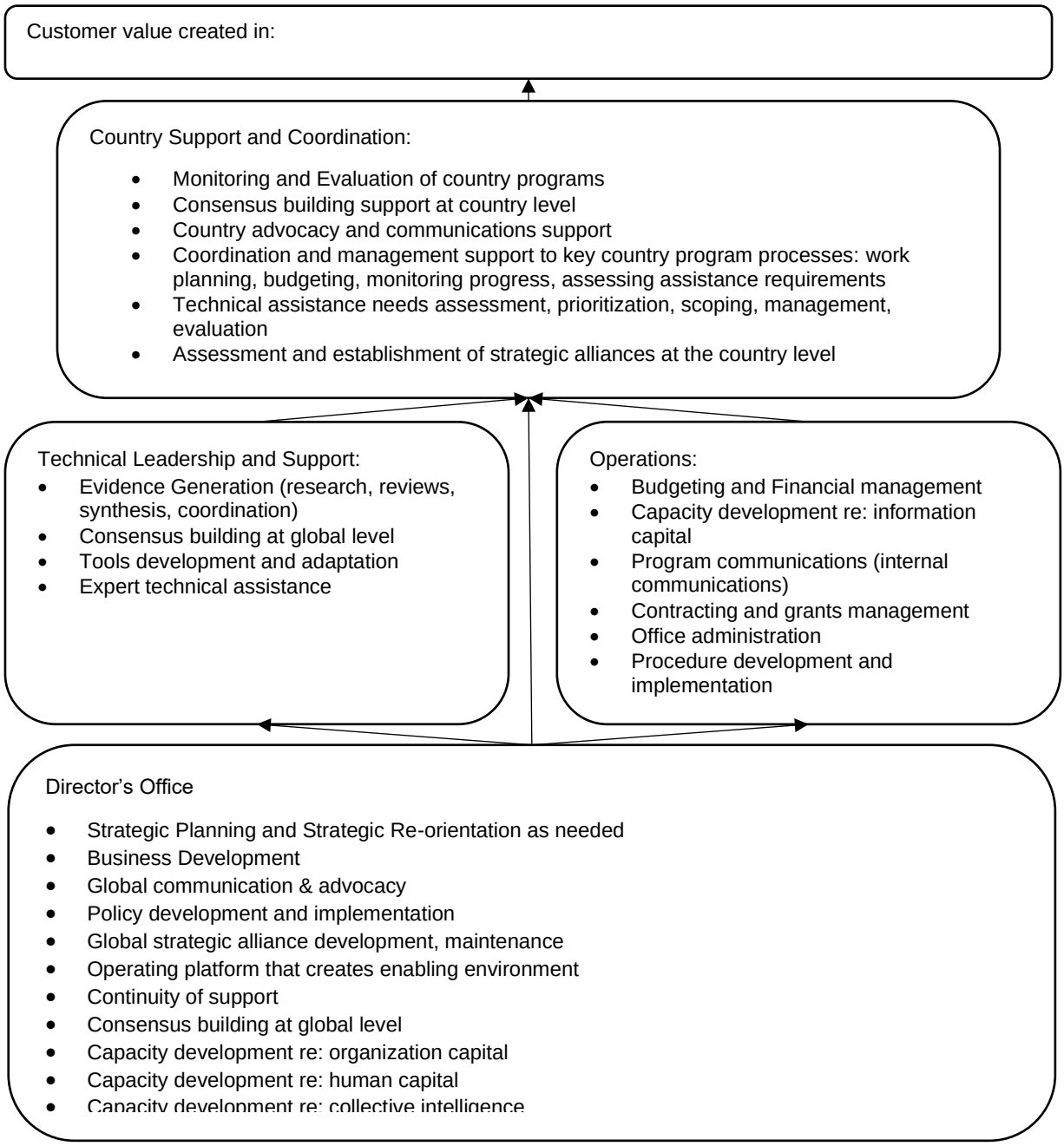
Throughout the strategic planning process, the Operating Matrix is filled in. The first step is filling in what is already known about the organization. Information is typically already available to fill in some of what is needed in the sections: performance environment and the cultures of development, service, accountability, and leadership. The section on strategy focused culture is completed during the strategic planning process and aligns with what was shared in the Strategic planning technology section of chapter 3. Engagement.

When the Operating Matrix is filled in with what is already known, it can also reveal what is not yet known or what needs to be strengthened in an organization. This organizational development work can become one of the strategies of the organization if it makes sense to do so.

Functional organogram

The second step in implementation is to look at the accomplishments in the strategic planning for the purpose of developing a functional organogram. At this point, the emphasis is on 'form follows function'. You want to align the form, the structure, to the natural groupings of functions that are visible to you. As you do this work, don't think about how the organization is currently structured with its divisions, departments and business units. The work at this time is to follow the natural flow of capturing the functional areas into some kind of diagram. Once this is complete, if your organization already has a functional organogram, compare the two and notice what needs to be adjusted.

Example functional organogram



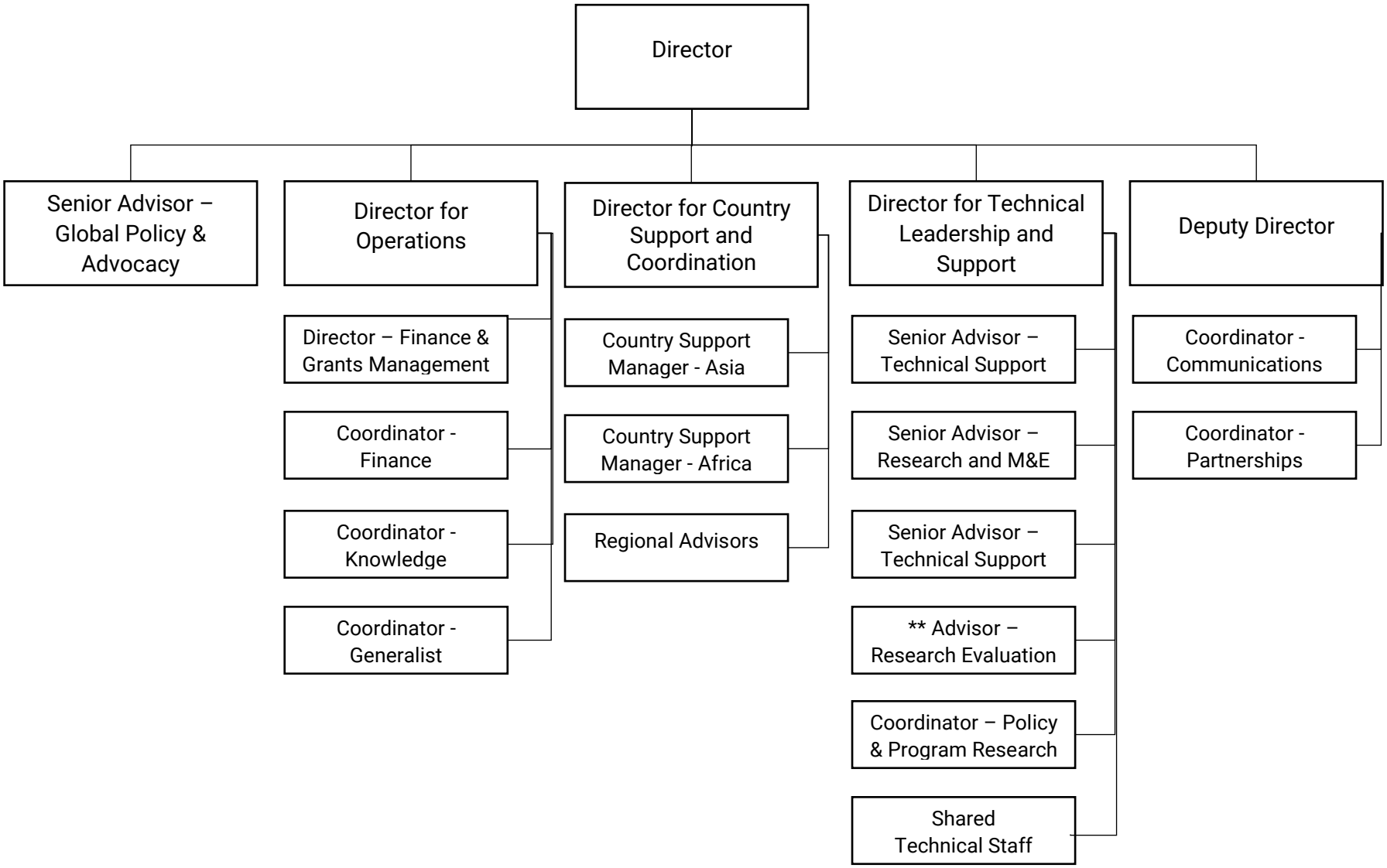
Reporting organogram

The third step in implementation is to look at the functional organogram and create a reporting organogram that supports the functional areas in the organization. Usually, the current reporting organogram clusters people into divisions and departments that end up with silos of operation in an organization. The task now in creating the reporting organogram based on the functional organogram is to revise it to include the cross-cutting work that needs to be carried out. Functional areas often (maybe almost always) require people from several departments to work together. Once you have a reporting organogram that supports the cross-cutting work, compare it to the existing reporting organogram. Notice what needs to be adjusted.
This isn't restructuring for the sake of restructuring, it is restructuring that comes from the rationale built upon the internal processes the organization must excel at, the capacity to deliver on those internal processes, and the emergent functional areas. All of this is coherent throughout to accomplishing the chosen high-level strategies.

An example of a reporting organogram is found on the next page.

At this point, you have an organization-wide view of aligning the human resources for implementing the strategies.

Example reporting organogram



Implementation blueprint

The fourth step in implementing the strategies is the development of an organization-wide implementation blueprint. We have provided one sample for structuring an implementation blueprint. However, if your company/organization already has a preferred method for laying out an operational plan that includes targets, milestones, resources needed, and measurement it is wise to stay with what you have.

Calendar of milestones

The fifth step is to develop an overall calendar of key milestones, to realistically assess the capacity of the organization for achieving the milestones. Once all the milestones can be plotted on a calendar, interdependencies and adjustments can be clearly seen, so that near term and longer-term adjustments to the organization-wide implementation blueprint can be made.

Business units aligning operations

The sixth step is the purview of the business units to align their operational plans to the organization-wide implementation blueprint. To begin, the business unit develops its own strategy map for the unit building on what it needs to accomplish its part of the organization-wide strategy map. The business unit needs to clarify the internal processes that it must excel at to support the organization, and the capacity it needs to excel at these internal processes.

With the information from its own strategy map, the operational plan that gets developed for the business unit aligns all operations to the internal processes that it must excel at, and to ensuring that the capacity is created to excel at those internal processes. Basically, all behaviors, actions, and decisions of the organization need to be aligned to the strategy or discarded. Ideally there should be no behaviors, actions, or decisions that are not congruent with the new strategy map.

The development of the business unit strategy map and operational plans needs to follow the same pattern that we have set in Genuine Contact Strategic Planning for the whole organization. The need is to continue the artful weaving of people, process and strategic planning technology. This means that participatory methods are used in the meetings involved in formulating the strategy map and operational plan. It also means following the Six Level Evolutionary Spiral beginning with discernment, then on to readiness, engagement, and then construction of the strategy map and the operational plan.

The people in the business units will understand that change is happening, that job descriptions are likely to have changes, that some positions might be eliminated, and others might be created as the business unit adjusts itself to aligning for its part in successful strategic plan execution.

With the dynamic nature of organizations, life happens. A target that seemed to be the best target one day doesn't bear up under scrutiny of helping the organization achieve its strategic goal later on. Thus, the organization can expect the targets within business units to constantly realign, using the high-level strategies and the organization-wide strategy map as the compass.

Learning summary

You have gone through many activities to understand the approach to implementing a strategic plan. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of implementation that you feel is important to remember or refer to.

Notes:

Notes:

6. Monitoring and Adjustment

Learning together to thrive in a performance environment of constant change.
~ Rachel Bolton

You'll look at the difference between performance management in relation to monitoring and adjustment. In this phase you will identify what monitoring needs to include and why. If monitoring shows that the implementation of the strategic plan is off course, adjustments will need to be made. You'll learn what is meant by a strategic plan refresh if the decision is that the plan itself needs adjusting.

Ongoing governance through strategy

It is at this monitoring and adjustment level that the leadership team really explores ongoing governance of the organization through strategy. At the start of the strategic planning process, leaders may not have fully understood that strategy and operations are not separate and at this point in the process, they are better equipped to understand that operations exist for the purpose of achieving the high level strategies and are equipped to plan for an ongoing process of being a strategy-focused organization. As part of a strategy-focused culture, people throughout the organization are brought together to determine mechanisms for accountability, integration, and support.

Hint: usually, monitoring and adjustment is not initially focused on the individual but is focused on the business unit's demonstrated achievements of their targets.

A Genuine Contact tool that you are already familiar with is useful in developing a plan for monitoring and adjustment. You probably know the levels of the Six Level Evolutionary Spiral from memory now: discernment, readiness, engagement, construction, implementation, and then monitoring and adjustment.

The over-arching theme for this go through of the Six Level Evolutionary Spiral is Monitoring and Adjustment.

- **Discernment**: As you consider what needs to be discerned, you could include discerning the difference between performance management and monitoring and adjustment; and discerning the purpose of monitoring and adjustment.

- **Readiness**: As you consider what readiness involves regarding monitoring and adjustment, you could include whether there is leadership for monitoring and adjustment a vision of what it is intended to accomplish, who needs to be involved in monitoring and adjustment, and what is being monitored and adjusted.

- **Engagement**: As you consider what engagement involves regarding monitoring and adjustment, you could include an exploration of to create enthusiasm for monitoring and adjustment; and whether participatory processes would be valuable or not regarding monitoring and adjustment work.

- **Construction**: You'll consider what needs to be constructed for monitoring and adjustment in the organization. Go back over the Five Beliefs of Genuine Contact presented to you earlier, and maybe now in your toolkit. These Five Beliefs provide guidance for you regarding construction. Prime among these are the beliefs regarding everything being connected, to keep it simple, and that change is constant.

- **Implementation**: You'll consider how to implement your monitoring and adjustment plan.

Notes:

Strategy Plan Refresh

As you worked your way through the Six Level Evolutionary Spiral to develop your monitoring and adjustment plan, you likely had an easier time in reaching conclusions about monitoring than you did about adjustment. Sometimes, adjustments that are needed are fairly simple to recognize and to act on. At other times, via the monitoring, it can be clear that continuing to implement the strategic plan as it is, is no longer in the best interest of the organization.

Remember, the performance environment is constantly changing, and what may have been just the right strategy at the time of making the plan, could be identified as less valuable over time. What does adjustment mean when the strategies themselves need to be adjusted? It doesn't mean that it is time to develop a whole new strategic plan. Rather, it is time for a strategy plan refresh.

The strategy plan refresh process is developed in much the same way as the strategic planning process you have learned in this module.

- Rather than creating new high-level strategies, the process is designed to look at what strategies are still supportive of achieving the organization's purpose and vision and which strategies need to be adjusted, ended, or created.
- With refined strategies in place, the people look now at the layers of the strategy map to determine what needs to be changed, ended, or created to achieve these updated strategies.
- The implementation blueprint and operational plan are updated based on the refined high-level strategies and strategy map.

As the plan for monitoring and adjustment is created, it can be valuable to agree on the approach to determining whether a refresh is needed. This approach could include:

- An annual refresh at an appropriate time within the organization's work cycle (e.g.: in the quarter before the annual workplan is constructed)
- What kinds of changes in the external environment should trigger a strategic plan refresh outside of the annual review (e.g.: new technology or research that disrupts the industry or unforseen global economic challenges)
- What kinds of changes in the internal environment should trigger a strategic plan refresh outside of the annual review (e.g.: unexpected change in organizational capacity due to staffing changes or an unanticipated business opportunity)

Using the approach of a strategic plan refresh, it is possible to extend the life of the original strategic plan beyond the original 3-5 year scope. In the monitoring and adjustment plan, it can also be helpful to identify the criteria for creating a new strategic plan again.

Notes:

Learning summary

You have gone through many activities to understand the approach to monitoring and adjusting the implementation of the strategic plan. You are invited to review your notes, reflections, and insights and to do a brief and clear summary of the value of monitoring and adjustment that you feel is important to remember or refer to.

Notes:

Learning check-in

We now go back to the baseline measure that you completed at the start of this Strategic Planning the Genuine Contact Way module. You are invited to answer the same questions that you answered in the baseline assessment, determining progress with your learning. Answer these same questions here and then look back to your original assessment on page 8 to determine your progress.

You are invited to answer the following reflection questions using a scale of 1 to 10, with 1 as low and 10 as high.

How much do you feel that you know about what strategic planning is?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about helping an organization get into readiness for strategic planning?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about engaging the people of an organization in strategic planning?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about constructing a strategic plan that leads to successful implementation?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about implementing a strategic plan?
1 2 3 4 5 6 7 8 9 10

How much do you feel that you know about monitoring and adjusting a strategic plan?
1 2 3 4 5 6 7 8 9 10

Notes:

Thank You

It is now time for our own closing circle. Thank you for participating in this learning journey. We ask that you complete an evaluation form before you leave.

And of course, we would be delighted to see you take the full Genuine Contact™ program. Training dates and locations are available on at www.genuinecontact.net.

And if you were pleased by this program, please pass word on to others. Thank you and journey well.

Credits and Acknowledgements

- The Genuine Contact program and way of working were developed by Birgitt Wiliams and Ward Williams. This learning module was created by Birgitt Williams and Rachel Bolton of Dalar International Consultancy. They can be reached at www.dalarinternational.com.

- Open Space Technology was created by Harrison Owen and is described by Harrison Owen in his books published by Berrett-Koehler.

- The Four Fold Way was researched and written by Dr. Angeles Arrien, cultural anthropologist and business consultant.

- Whole Person Process Facilitation was created by Birgitt Williams and Ward Williams of Dalar International Consultancy, Inc with a foundation in the work of Marge Denis of Stillpoint, Huntsville, Ontario, Canada in Process Facilitation.

- The Genuine Contact logo, workbook design, and other graphic design are the work of Maya Lie of Providers of Goodness. She can be reached at http://providersofgoodness.com.

- The manuals and other media for the Genuine Contact™ program are maintained by the Genuine Contact Organization. You can reach the Director, Rachel Bolton, at pd@genuinecontact.net.

- A comprehensive bibliography for the Genuine Contact™ program and a recommended reading list for this learning module is available at genuinecontact.net/recommended-reading/

Become a Member

You are invited to become a member of the Genuine Contact Organization. To support and invest in this organization and its work to spread Genuine Contact in the world.

For over 2 decades, Genuine Contact has grown and spread in the world through reciprocal relationships. While learning the modules of the Genuine Contact Program teaches tools and methods that can be applied immediately, being a member of the Genuine Contact Organization and contributing to its work offers an ongoing opportunity for learning deeply about the Genuine Contact way of working.

Built on a foundation of 5 beliefs, the 9 modules of the Genuine Contact Program, working with the Medicine Wheel Tool, and mentoring, our members contribute their time, passion, and wisdom to spread Genuine Contact in the world while benefitting from a powerful and holistic way of working in organizations and a vibrant membership community.

Membership is open to people who are ready to:

- experience great benefit through the insights, wisdom, and relationships you have by being a member of this ongoing mentoring circle
- find value in the resources that are available to you through your connection to this organization
- benefit in using Genuine Contact in your work and want to contribute to its ongoing growth and development
- have a desire to participate in and contribute to the success of the Genuine Contact Organization that makes all of this possible

Membership is much more valuable than any list of services and benefits could possibly communicate. The real value is in the relationships developed, the connections made, and the opportunities taken advantage of through time spent with other members. There are also quite a number of direct, tangible benefits that our members use from the moment they join – making the decision to become a member an easy one.

Choose Your Membership Package

With 6 membership levels to choose from, there is one that's just right to meet your learning need and your contribution goals – choose the one that suits you best, and if you have any questions, feel free to contact our Director to help you choose just the right option.

For as little as $99 annually, you can support the future of the Genuine Contact way of living and working.

Learn more about membership at https://genuinecontact.net/membership/

Genuine Contact
Quality Commitment

Preamble

Genuine Contact™ Professionals have adopted a holistic approach to leadership and organizational development based on the approach, program, and power of the Genuine Contact Program. They have developed competence in working with at least Whole Person Process Facilitation (Module 2) of the Genuine Contact Program to assist leaders and organizations in their development.

Genuine Contact Professionals, when working with modules of the Genuine Contact Program in their work as organizational consultants, leadership development consultants, and meeting facilitators, work within the scope of the modules that they have developed competency in. Genuine Contact Professionals may also apply different meeting methodologies like World Café, Appreciative Inquiry if they seem more suited to the business goal.

Depending on the needs of the client, a Genuine Contact Professional can pull larger teams together from amongst the Genuine Contact Professionals, and others whose work is in alignment with our quality commitment, when needed.

To ascertain if someone is a Genuine Contact Professional, a client can check with the Genuine Contact Program Director at gcprodir@gmail.com. While the Program Director cannot remark about the competence of the person, s/he can verify that a Quality Commitment has been made. Leaders and organizations seeking to engage a Genuine Contact Professional are responsible for selecting him/her and doing their own reference checks.

Genuine Contact Professionals make the following commitments to ensure the most beneficial results of their work and recommit to this Quality Commitment annually.

Quality Commitment

I assure the quality of my work with the following:

Meeting Facilitation

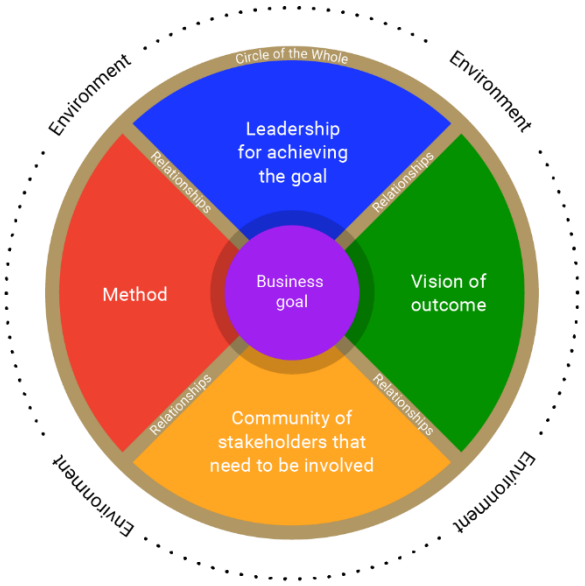
When working with the Genuine Contact™ approach to facilitate meetings, I follow an established protocol which includes preparation meetings, facilitation of the main meeting, facilitation of a debrief meeting, and ensuring a follow up accountability meeting whenever possible. I use Whole Person Process Facilitation as the participative and creative method for the preparation and debrief meetings and either Open Space Technology or Whole Person Process Facilitation or another participatory approach such as Future Search, World Café, or Appreciative Inquiry (all credible participatory meeting methods) for facilitating the conference or main meeting.

Even when meeting methodologies are used that are not part of the Genuine Contact program, they will be conducted within the operating platform of a Whole Person Process Facilitation meeting, when possible.

Upon completion of the conference and/or meeting, I can provide my clients with an evaluation, based upon participant feedback upon request.

Longer Term Consulting Services for Personal Development, Leadership Development and/or Organizational Development

At the time of contracting, I and my client ensure that we have:



- clarity about the business goal of the assignment
- leadership considerations regarding success of the assignment in the organization
- expectations of the client (deliverables)
- who the people are who need to be involved for the assignment to be successful
- the design
- how the relationships will be worked out for success
- how the collective intelligence of the organization will be accessed if needed.

A schedule of review meetings will be established for course correction as needed in relation to the initial scope of the agreement. I understand the importance of continuous review and change rather than waiting until the final review.

Personal Competence, Capability, and Capacity Development

As Genuine Contact Professional, I commit to my ongoing personal competence, capability, and capacity development with:

- Ongoing participation in the Genuine Contact mailing lists (international & language-specific if available)
- International Genuine Contact Mentoring Circles (in person as well as in online environment)
- Regional and/or local Genuine Contact Mentoring Circles
- GC Newsletters / Blogs
- Participation in at least one Genuine Contact training annually, either through intensifying learning in a familiar module or taking additional modules, to be done in person, on-line, or by reviewing a GC training workbook.
- Any other engagement in Genuine Contact activities

Environmental Protection Policy

I use food, materials and techniques that ensure the least possible negative impact on the environment. This includes - whenever possible - but is not limited to recycled (flipchart) paper, water based markers, refill-products, organic food, snacks and drinks, energy saving technical products.

The Genuine Contact™ Program

Foundational Givens, Beliefs, Components, and Key Concepts of working with Genuine Contact

Birgitt and Ward Williams designed the Genuine Contact™ program with simplicity in mind. The program, focusing on attending to organizational health and balance as a foundation for organizational success, uses meetings as a catalyst for organizations to develop as conscious, life nurturing, interconnected creative organizations. Meetings are used as a catalyst. Management learns to manage differently. We call these organizations Genuine Contact Organizations. The process is organic so that every organization brings about its own unique change from within.

Foundational Givens of the Genuine Contact™ program

Birgitt and Ward Williams established minimal Foundational Givens for the Genuine Contact™ program. Foundational Givens define the approach and are not open for change. Basically, Foundational Givens are keys in defining what the program is and what it is not. On September 21st, 2001, Birgitt and Ward Williams invited the first group of graduating GC Trainers and all graduating GC Trainers in subsequent years, to participate in a Genuine Contact Organization within the theme of developing the approach within the following five Foundational Givens listed below.

In 2006 the GC Co-Owners Group Ltd. was formed, and additional Operating Givens of the GC Co-Owners Group Ltd. have been developed over time and are open for review and change by all members of the organization. The Operating Givens are available in the Co-Owners Space online (ask Program Director for access). Foundational givens are not open for change.

Foundational Givens:

1. The 5 foundational beliefs as noted below.
2. There are 11 components of the Genuine Contact™ program as noted below.
3. Requirement to provide the Workbooks developed by Birgitt and Ward Williams when a GC Training is offered.
4. Limited givens, maximum choice and participation.
5. Limited external consultant involvement with maximum skill and capacity building.

Beliefs of Genuine Contact

Within the Genuine Contact approach and program, we work from the following five foundational beliefs:

1. We believe that spirit or Spirit matters, that through spirit or Spirit, all of creation is connected, and that people are precious.

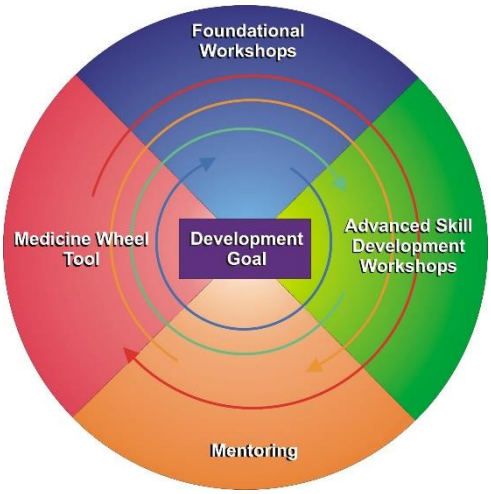
2. We believe that every organism (including the organization) has within it the blueprint for its own optimal health and balance.

3. We believe that focusing on genuine contact enables individuals and organizations to achieve the individual and organizational health and balance that is needed for optimal effectiveness. Positive change in the organization is directly linked to positive change in individuals. Both are required for sustainable new ways of working.

4. We believe in keeping it simple. Simple frameworks and processes enable success with complex situations. In keeping it simple, we recognize that any sustainable change must begin from the inside and cannot be externally initiated or driven.

5. We believe that change with its accompanying loss, grief work, and conflict is constant. Organizations that develop mastery in working with change can sustain optimal effectiveness. These leaders and organizations recognize that change cannot be managed, that energy spent trying to manage change is wasted energy, and that productive use of individual and organizational energy is achieved by working with change rather than against it.

Components of the Genuine Contact™ program



The Foundational Learning Modules and Advanced Skill Development Learning Modules make up the Genuine Contact program and approach. The series provides skill, capacity, and competency development in the Genuine Contact program as well as providing the conditions to assimilate the Genuine Contact approach.

1. <u>Foundations 1: Path to Organizational Health and Balance</u>
offers leaders an opportunity to make the difference in the performance of your organization through the importance of balance, cleansing, and nourishing in a way similar to the holistic approach to the health of the human body.

2. <u>Foundations 2: Achieving and Regenerating Organizational Health and Balance</u>
explores the state of health of organizations from a holistic organizational growth perspective and aids in developing your own prescription through a self-administered diagnosis, towards achieving and maintaining a healthy organization in these rapidly changing times.

3. Foundations 3: Individual Health and Balance
   explores the state of individual health and how to maintain a state of optimal health even in highly stressful situations.

4. Foundations 4: Holistic Leadership Development
   develops the skills, capacity, and knowledge for the new leadership paradigm 'leading so that people will lead' and to nourish a culture of leadership.

5. Advanced Skill Development 1: Working with Open Space Technology
   develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.

6. Advanced Skill Development 2: Whole Person Process Facilitation
   develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens.

7. Advanced Skill Development 3: Cross Cultural Conflict Resolution
   develops and enhances skills to facilitate meetings in which people determine personal boundaries and view situations from flexible rather than fixed perspectives.

8. Advanced Skill Development 4: The Genuine Contact Organization
   develops and enhances skills in leading and mentoring conscious interconnected learning organizations. These organizations provide the conditions for choices to be life nurturing rather than life depleting.

9. Advanced Skill Development 5: Train the Trainer
   develops and enhances skills to teach others in all the components of the Genuine Contact™ program, ensuring that the program maintains its integrity (wholeness) and respects the unique contributions that each individual makes to the program.

10. We offer Mentoring as a forum to learn the art of mentoring and to walk the talk of mentoring of both individuals and organizations.

11. We underpin the Genuine Contact™ program with the healing circle or medicine wheel as the overall matrix for our learning, healing, development, evolution, and consciousness. As Medicine Wheel Tool© it assists us in walking the mystical path with practical feet and bringing about results that exceed expectations.

Key Concepts of working with Genuine Contact™

There are 9 key concepts supporting the foundational beliefs and development of the Genuine Contact Program:

1. Opportunities for genuine contact begin with the courage to be in genuine contact with the self and extend into all relationships.

2. Work of, with, from, and to Spirit can be experienced as a harmonic resonance that can be facilitated, beginning with establishing the harmonic resonance within the self as the facilitator. This requires discipline in a state of BEING in this harmonic resonance as the key work for the facilitator. In doing so, we work with healing energy, drawing from knowledge in the healing arts.

3. We work with the blueprint for health in the organism (the individual and/or the organization) by attending to balance, cleansing, and nourishing.

4. Change is constant and organizations must be developed to thrive in change. Organizational effectiveness in motion is a required organizational capability if they wish to thrive in future times of intense change.

5. We use meetings as a catalyst to assist the organization to attain a state of health and balance. The two meeting methodologies used are Open Space Technology developed by Harrison Owen, USA and Whole Person Process Facilitation developed by Birgitt, USA. Both meeting methodologies are highly participative, within a boundary established by predetermined “givens".

   Within Open Space Technology, a harmonic frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.

   Whole Person Process Facilitation was developed by Birgitt Williams to complement working with Open Space Technology as a meeting methodology equally as participative, with similar values, and yet serving the organization when a process as open as Open Space Technology is not appropriate to the agenda and circumstance.

   Within Whole Person Process Facilitation, a harmonic frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens. The topics are predetermined, thereby offering a more obviously structured agenda than Open Space Technology.

6. We believe that a liberating structure, combined with a participatory architecture is essential to achieve and sustain organizational health and balance so that organizations are highly effective and able to thrive in constant change.

7. We work with Open Space Technology and Whole Person Process Facilitation as interventions that enable health and balance in the ongoing life of the organization. We recognize these meeting processes as powerful and impactful in the ongoing life of the organization, therefore we attend carefully to both the pre-work (before a meeting) and the debrief work (after the meeting).

8. We recognize that everyone facilitating and leading using the Genuine Contact™ program will do so with their own unique style and experience. However, it is also necessary to guarantee to organizations who bring this program into the organization that they are receiving consistency with the component parts and/or their development as a genuine contact organization. Clients are entitled to assurance that when they engage in any components of the Genuine Contact™ program, that it maintains integrity. Within the Genuine Contact™ program, the components are standardized and can be easily duplicated. When any of the components are offered in an organization, the client is guaranteed of a certain standard.

9. Component parts of the program have value if taken on their own.

The overall goal is to have the Genuine Contact™ approach and program make a life nurturing difference in the world.

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