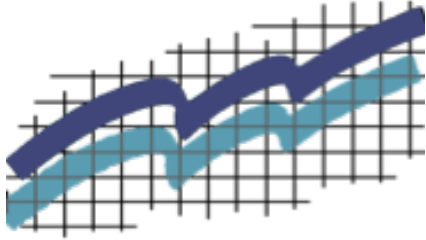


The Consulting Team's

Leadership Tips



NOTE FROM THE CONSULTING TEAM

In this issue, The Consulting Team presents the first step in effective strategic planning: assessing your current situation. Just like finding directions on MapQuest, you need to input your starting point (current situation) and your destination (your vision) to find your best route (strategic plan).

At the Consulting Team, we use the SLOTs analysis to help organizations determine what important factors map where they stand today. S, L, O, and T are the initials for (internal) Strengths and Limitations and (external) Opportunities and Threats. Investigated and documented, these factors provide the basis for the rest of the planning process.

We hope this issue helps you think more strategically and apply some useful planning tools. Planning your future helps you respond proactively, rather than reactively, in meeting challenges that will face your organization.

We have a proven track record in helping organizations plan. If you or your team are considering developing or revising your business plans, in this *Leadership Tips* we share ideas that will help you get started.

Warm regards,

The Consulting Team

• (650) 965-3663

Plotting a Strategic Path

Assessing Your Current Situation

“Planning is bringing the future into the present so that you can do something about it now.”
~ Alan Lakein

With the economic dips and developments within the last year, many organizations are choosing the wise path. They are reviewing and revising their strategic goals and plans to accommodate these unforeseen, unpredictable changes. A fair share of this work will be in reassessing their current situations and core services or products. Viewing future possibilities through a realistic understanding of today's circumstances, is the first step toward “do something about it now.”

Without a strategic plan, managing can become the “Ready, fire, aim” approach that breeds confusion, waste, and lackluster results. Using the **SLOTs Analysis** (often called SWOTs), a simple and effective tool, your organization can determine its current Strengths, Limitations, Opportunities, and Threats. Guided by your Mission and Vision, they can quickly lead to a solid set of priorities, goals, and actions steps. For working definitions of each of these key areas, see the **Tools of the Trade** box on the next page.



The Consulting Team expertly led our executive team through competitive assessment, strategic planning, priorities, and goals setting. More impressive, they brought out our untapped creative side to go beyond where we believed the company could.

~ Pete Nelson, CEO, California Water Services

Collecting information on these four key areas is as varied as are organizations. The fastest method is to have the executive team meet to discuss and list their perceptions of each SLOTs category. Larger, broader samples can provide more useful information.

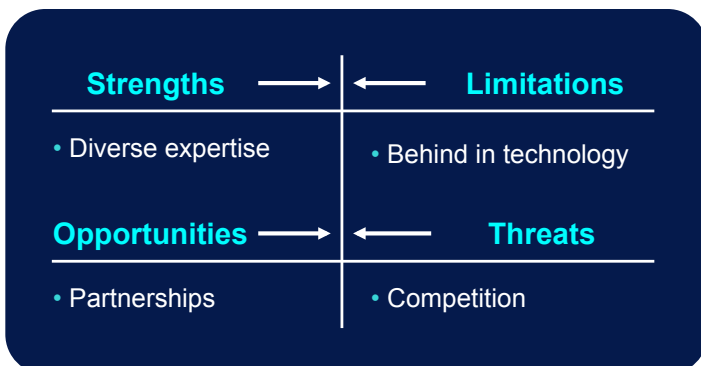
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Top management, staff, marketing and public relations, sales, engineering, external partners, and stakeholders (including customers) may have different and equally valid information about the organization. This may be useful in developing a robust strategic plan. Added data collection through surveys and interviews, including focus group interviews, provides a more complete picture. The broader and deeper you explore, the more possibilities you are likely to uncover.

"Creating change in an organization is a process. The Consulting Team assisted the department in creating a sense of urgency. This enabled us to come together as a team to analyze our current situation, create a vision for the department, and then develop strategies to achieve the vision."

~ Mike Harden, Chief of Police, City of Modesto

The outcome of conducting a SLOTS assessment helps you to develop new ideas. The framework that displays the areas of concern or interest is called a "force field analysis." It suggests an opposing dynamic between the internal forces of the organization, i.e., strengths and limitations. This opposition also exists between opportunities and threats, the external, environmental forces. This dynamic tension helps teams break free of the status quo to drive change. In The Consulting Team's experience, the thornier the issues facing an organization, the more creative the solutions the organization can develop. The following SLOTS diagram example illustrates this analysis:



Every SLOTS analysis will yield different results, not only between organizations, but for the same organization at different times. The possibilities it suggests are endlessly varied and exciting. The work of the team engaged in the strategic planning effort is to welcome the creative

Tools of the Trade: SLOTS Analysis

To understand the current state of your organization, list:

Strengths: Internal assets, processes, systems, financials, and skills contributing to your success

Limitations: Internal processes, systems, financials, or capabilities limiting your effectiveness and efficiency

Opportunities: External factors, i.e., laws, demographics, economy, trends, innovations that can contribute to your success

Threats: External factors that threaten or are barriers to your success

tension between the opposing influences in developing innovative priorities.

Before you meet to list your 3-5 year priorities, group the SLOTS information into major categories. Weighting or ranking these categories can help you select your priorities, which will guide the actions needed to meet your mission and reach your vision.

We suggest two helpful approaches for your successful strategic planning effort. Take your team to a retreat to accomplish the work. This helps to avoid interruptions and to focus on the creative process of building future paths. Also, designate a meeting facilitator. A skillful, experienced, neutral facilitator will guide the team through the process and enhance team capabilities and relationships.

"Through the planning process, The Consulting Team facilitators kept the team focused on the issues at hand. They engaged the participants to make this experience a team effort. In the end, we saw our actions become reality in our new strategic plan."

~ Lloyd Lowe, Chief of Police, City of Hayward

Want to Learn More About This Issue of Leadership Tips?

Here is a sample of what we have to offer.....

Visit the following links for more information:

Our Free Assessment:

- ▶ [Strategic Planning Check-Up](#)
- ▶ [Facilitator's Competency](#)

Our Consulting Services include:

- ▶ [Strategic Planning Consultation](#)
- ▶ [Facilitating Meetings and Retreats](#)

View Descriptions of Related Training:

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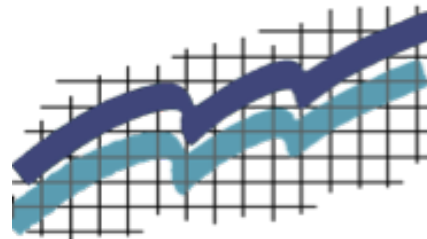
Quick Tips Brown Bag Workshops

- ▶ The Consulting Team is providing low-cost, brown bag workshops! Call Marilyn for details: (650) 965-3663.

About Leadership Tips

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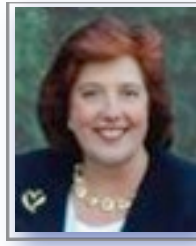
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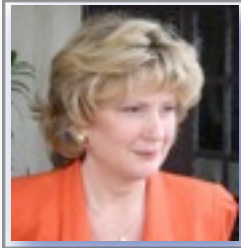
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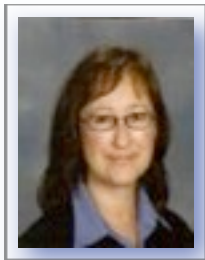
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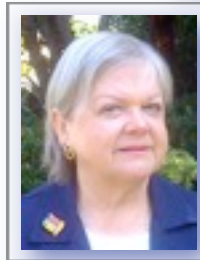
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Core Team Talents

Our Core Team of consultants each bring over 15 years of experience and expertise to add breadth and depth to our services. Over the coming months, we will provide you with information about their key skills. This month we feature:

Lynn Myhal, Ph.D., M.C.C. Consultant and Executive Coach

Dr. Lynn Myhal has provided organization development (OD), leadership development, and training, as well as integral coaching to senior executives and their teams, in the public and private sectors for over 14 years. She uses her experience as a scientist, manager, leader, and consultant along with certifications in OD, integral coaching, and a wide variety of continuous learning.

Her expertise includes facilitation, change management and implementation, and process improvement. Lynn has designed and delivered management training and also designed, taught, and evaluated coaching courses for JFK University's Graduate School of Psychology for five years.

Lynn has a B.S. degree from Bates College and a Ph.D. from University of Rhode Island. She has been certified as a Master Certified Coach by the International Coaching Federation. She is a member of the American Society for Training and Development, Institute of Management Consultants, Professional Coaches and Mentors Association, National ODNet, and International Coach Federation.