CRS Strategic Planning Workshops:

- Workshop objectives
- Types of workshops offered
- Workshop logic
- Typical workshop programme
- About us
Our strategic planning workshops have 3 main objectives

**Leadership alignment**
- **Strategic clarity**
- **Strategic operationalisation**
- **Strategy translated into operational terms**

**Mission**
- Build mutual trust and respect
- Get to know each other better
- Agreement, common understanding and shared views
- Renewed energy, excitement, rigour, discipline, and urgency
- Shared views of the present and the future

**Core purpose**
- Insight
- Increased commitment and accountability
- Shared views of the present and the future

**Core values**
- The articulated and clearly understood concept of the desired future state

**Positioning for competitive advantage**
- Leadership formulates strategy
- Leadership drives and implements strategy

**Customer value proposition**
- Insight
- Customer value proposition

**Our workshops are geared to serve as the first step towards effective strategy implementation.**

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CRS Strategic Planning Workshops:

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Based on client needs, we offer 3 types of strategic planning workshops

<table>
<thead>
<tr>
<th>Workshop type</th>
<th>Nature</th>
<th>Duration</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
</table>
| Cold facilitation | • Purely process-driven  
• Recommended only for clients with which CRS has an ongoing relationship and of which CRS has a thorough understanding, or strategically sophisticated clients, or client-prescribed set format  
• Facilitator not expected to add value other than pure facilitation | • Workshop: 1 – 2 days  
• Workshop summary and recommendations (optional): 1 day | • Least expensive | • Facilitator not familiar with client’s situation  
• Facilitator not adding value other than pure facilitation |
| Informed facilitation | • Client furnishes facilitator with CRS client strategic information pack beforehand | • Preparation: 1 – 2 days  
• Workshop: 1 – 2 days  
• Workshop summary and recommendations: 1 - 2 days | • Better workshop structuring in line with strategic needs | • Facilitator’s content value-add limited to interpreting what client provides |
| Workshop as part of strategy work | • Facilitator assesses client’s strategic situation beforehand by means of focus interviews and desk research  
• Facilitator acts as formal strategic advisor | • Preparation: 3 - 5 days  
• Workshop: 1 – 2 days  
• Strategy report: 2 - 3 days | • Most effective option  
• Full set of strategic planning toolkits can be applied  
• Best for subsequent strategy implementation | • Most expensive option |

Out strategic planning workshop rates are based on number of days spent, and number of delegates attending. Discuss your specific requirements with us to enable us to quote. Also see Strategy Workshops on our web site.
**WORKSHOP TYPES OFFERED**

**Client/CRS inputs and CRS deliverables depend on the type of workshop selected**

<table>
<thead>
<tr>
<th>Workshop type</th>
<th>Prior client inputs</th>
<th>Client preparation</th>
<th>CRS Workshop material</th>
<th>CRS deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Client strategic information pack</td>
<td>Preparation pack</td>
<td>Study material pack</td>
<td>Workshop handout pack</td>
</tr>
<tr>
<td>Cold facilitation</td>
<td>❌</td>
<td>?</td>
<td>?</td>
<td>✓</td>
</tr>
<tr>
<td>Informed facilitation</td>
<td>?</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Workshop as part of strategy work</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Client information pack:**
- Provided by client to CRS prior to the workshop
- Based on CRS information requirements
- Consists of basic strategic and marketing information requests to pre-populate strategic planning models

**Client preparation pack:**
- Provided by CRS to client prior to the workshop
- Topics for pre-preparation

**Client study material pack:**
- Provided by CRS to client prior to the workshop
- Typically relevant Harvard Business Review articles
- Visioning principles
- Balanced Scorecard and strategy map principles

**Workshop handout pack:**
- Handed out at workshop
- Workshop agenda and objectives
- Content material and strategy principles
- Pre-populated models as inputs for discussion
CRS Strategic Planning Workshops:

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Where and what does the business wish to be, and how will it compete?

Underpinned by robust leadership, an appropriate organisational structure and support systems of information, planning, control and reward.

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A well conceived vision includes a core ideology and an envisioned future

Articulating a Vision:

- Core ideology
  - Core values
  - Core purpose

- Envisioned future
  - BHAG – Bold Hairy Audacious Goal
  - Vivid description

WORKSHOP LOGIC

Bron: J Collins and J Porras - HBR Sep-Oct 1996

Envisioned future
Core values
Core purpose

Present

Vision

Articulates the reason for being of an organisation
Provide control by guiding behaviour

Envisioned future

Bold Hairy Audacious Goal
Vivid description

Core purpose
Core values

Articulated vision includes a core ideology and an envisioned future

- BHAG – Bold Hairy Audacious Goal
- Vivid description
WORKSHOP LOGIC

The mission is made explicit by means of market segmentation and targeting

Example: Market Segmentation and Targeting

Competitive position

- **Pursue and invest**: Strong
- **Hold**: Average
- **Avoid/harvest/divest/reassess in future**: Weak

Market attractiveness

- High
- Medium
- Low

Inbound tourist market

Emerging black middle class market

US export market

European export markets

Other export markets

Traditional SA domestic market excluding tourists & emerging black middle class market

Inbound tourist market

Emerging black middle class market

US export market

European export markets

Other export markets

Traditional SA domestic market excluding tourists & emerging black middle class market

Inbound tourist market

Emerging black middle class market

US export market

European export markets

Other export markets

Traditional SA domestic market excluding tourists & emerging black middle class market
A positioning strategy for competitive advantage informs the customer value proposition

Example: Positioning

Overall cost leadership (compete on price)

- Losing
- Stuck
- Winning

Future – government customers
Future – private sector customers
Present

Differentiation (Compete on selection, quality, availability, functionality, service, partnership)

High
Medium
Low

High
Average
Low
**WORKSHOP LOGIC**

*In line with the latest developments in strategic planning, we workshop the client’s customer value proposition as input to the Customer Perspective of the Balanced Scorecard*

---

### Customer Value Propositions

<table>
<thead>
<tr>
<th>Customer value attributes</th>
<th>Customer value propositions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Operational excellence</td>
</tr>
<tr>
<td>Differentiator</td>
<td>Price</td>
</tr>
<tr>
<td>Benchmark standard</td>
<td>Quality</td>
</tr>
<tr>
<td>Product / service attributes</td>
<td>Availability</td>
</tr>
<tr>
<td></td>
<td>Selection</td>
</tr>
<tr>
<td></td>
<td>Functionality</td>
</tr>
<tr>
<td>Partnership attributes</td>
<td>Service</td>
</tr>
<tr>
<td></td>
<td>Partnership</td>
</tr>
<tr>
<td>Image</td>
<td>Brand</td>
</tr>
</tbody>
</table>
How will the business get there?

Strategy:

Where we are:
- Industry drivers
- Competitive forces
- Internal assessment
- SWOT
- Segmentation and targeting

How we will get there:
- Balanced Scorecard - future translated into objectives, measures and targets
- Accountabilities
- Implementation considerations – business transformation and change management

Where and what we wish to be, and how we will compete:
- Vision
- Mission
- Competitive strategy
- Customer value proposition
- Business model
- Value chain
- Structure
To enable implementation, the workshop translates strategy into operational terms using the Balanced Scorecard

**Strategy Operationalised:**

- **Vision:** Where the business will be
- **Mission:** What the business will be
- **Competitive strategy:** How the business will compete
- **Objectives:** What strategy must achieve
- **Measures:** How success in achieving the strategy will be measured and tracked
- **Targets:** The required performance level to be achieved over time
- **Initiatives:** Key action programs required to achieve objectives and targets

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Lastly, objectives, measures, target and accountability are captured for each BSC perspective of each department

Example: Financial Perspective:

<table>
<thead>
<tr>
<th>Goal</th>
<th>Objective</th>
<th>Measure</th>
<th>Target</th>
<th>Review frequency</th>
<th>Accountability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grow the market</td>
<td>Increase revenue</td>
<td>Turnover</td>
<td>R’m</td>
<td>Monthly</td>
<td>Marketing Director</td>
</tr>
<tr>
<td>Ensure effective and efficient use of resources</td>
<td>Adhere to cost budget</td>
<td>Cost</td>
<td>R’m</td>
<td>Monthly</td>
<td>CEO</td>
</tr>
<tr>
<td>Ensure effective and efficient use of resources</td>
<td>Efficient utilisation of resources</td>
<td>RONA</td>
<td>%</td>
<td>Monthly</td>
<td>Financial Director</td>
</tr>
</tbody>
</table>

To see how the workshop is executed in practice, see the next section for a typical workshop programme.
CRS Strategic Planning Workshops:

- Workshop objectives
- Types of workshops offered
- Workshop logic
- Typical workshop programme
- About us
# Strategic planning workshop agenda – Day 1

<table>
<thead>
<tr>
<th><strong>Agenda items</strong></th>
<th><strong>© 2009 Corporate Renewal Solutions</strong></th>
<th><strong>07h30 - 08h00</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Arrival, refreshments</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1. Setting the scene</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Opening &amp; introductions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Workshop objectives &amp; agenda review</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Expectations exchange &amp; ground rules</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2. Where we are</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• PESTLE industry drivers ¹ and competitive forces ²</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Threats and opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Tea break</strong></td>
<td></td>
<td>09h30 - 10h00</td>
</tr>
<tr>
<td>• Strengths and weaknesses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Segmentation and targeting</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

¹ PESTLE: political, economic, social, technological, legal & environmental industry divers

² Competitive forces: competitor, client & supplier analysis; threat of new entry and substitution
Strategic planning workshop agenda – Day 1 (continued)

### Agenda items

<table>
<thead>
<tr>
<th>3. Where we wish to go</th>
<th>Facilitator</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision – BHAG, core purpose, core values</td>
<td>11h00 - 13h00</td>
<td></td>
</tr>
<tr>
<td>Mission</td>
<td>11h00 - 13h00</td>
<td></td>
</tr>
</tbody>
</table>

Lunch: All 13h00 - 14h00

<table>
<thead>
<tr>
<th>4. How we will get there</th>
<th>Facilitator</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitive strategy – positioning and customer value proposition</td>
<td>14h00 - 15h30</td>
<td></td>
</tr>
</tbody>
</table>

Tea break: All 15h30 - 16h00

<table>
<thead>
<tr>
<th></th>
<th>Facilitator</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balanced Scorecard and strategy map overview</td>
<td>16h00 - 17h00</td>
<td></td>
</tr>
</tbody>
</table>

End of day one
## Strategic planning workshop agenda – Day 2

<table>
<thead>
<tr>
<th>Agenda items</th>
<th>Facilitator</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Recap of Day 1</td>
<td>Facilitator</td>
<td>08h00 - 08h30</td>
</tr>
<tr>
<td>4. How we will get there (continued)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Objectives, measures &amp; strategy maps per department</td>
<td>Breakout groups</td>
<td>08h30 - 10h30</td>
</tr>
<tr>
<td>Tea break</td>
<td>All</td>
<td>10h30 - 11h00</td>
</tr>
<tr>
<td>• Report-back per breakout group</td>
<td>Breakout groups</td>
<td>11h00 - 12h00</td>
</tr>
<tr>
<td>• Targets &amp; accountabilities per department</td>
<td>Breakout groups</td>
<td>12h00 - 13h00</td>
</tr>
<tr>
<td>Lunch</td>
<td>All</td>
<td>13h00 - 14h00</td>
</tr>
<tr>
<td>• Report-back per breakout group (cont.)</td>
<td>Breakout groups</td>
<td>14h00 - 15h00</td>
</tr>
<tr>
<td>Tea break</td>
<td>All</td>
<td>15h00 - 15h30</td>
</tr>
<tr>
<td>• Implementation aspects</td>
<td>Facilitator</td>
<td>15h30 - 16h30</td>
</tr>
<tr>
<td>5. Wrap-up</td>
<td>Facilitator</td>
<td>16h30 - 17h00</td>
</tr>
</tbody>
</table>
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- Workshop logic
- Typical workshop programme
- About us
ABOUT CORPORATE RENEWAL SOLUTIONS

CRS strategic planning workshops in action

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Fax: 086 510 6184
Email: corp@corporate-renewal.co.za

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www.corporate-renewal.co.za
www.business-rescue.co.za
www.turnaround-management.co.za

Web sites (2):
www.business-transformation.co.za
www.management-consulting.co.za

Since 1999
As part of strategy work in large-scale business transformation and turnaround projects
Standalone strategic planning workshops
CRS Strategic planning workshops in action (continued)
ABOUT CORPORATE RENEWAL SOLUTIONS

Contact us for your strategic planning workshop needs

Your facilitator: Jan van der Walt

- CEO: Corporate Renewal Solutions
- CEO and director: Turnaround Management Association – Southern Africa
- Member of Institute of Directors
- Member of Business Rescue Sub-Committee of the King III Commission on Governance
- DBA (Gordon Institute of Business Science) – in process, with research interest in business rescue
- MBA (Stanford Business School) - Fulbright Scholarship
- Honours B.Sc. in Operations Research (University of South Africa)
- B.Sc. Industrial Engineering degree cum laude (University of Pretoria)

Corporate Renewal Solutions is a black economic empowered management consulting firm specialising in strategy, and strategy-driven business transformation / turnaround of underperforming and distressed businesses

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CRS Turnaround Management: www.turnaround-management.co.za
CRS Management Consulting: www.management-consulting.co.za