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A white background featuring a stylized zigzag line on the left side. The line starts with a grey segment, then a dark purple segment, and ends with a lighter purple segment. The Silver Rock Consulting logo is positioned in the top right corner, including the text "Silver Rock CONSULTING" and the zigzag symbol. In the center, the text "Silver Rock Consulting" is written in a dark purple serif font, followed by "MRA Conference" in a smaller sans-serif font, and the quote "What's the Plan?" in a bold, italicized serif font. The date "July 26th, 2022" is located in the bottom left. In the bottom right corner, there is small text: "Proprietary & Confidential 1" and "Copyright © 2016 - 2022, Silver Rock Consulting, LLC".

1



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Setting Stage
Scott

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2



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Today's Reflection
Let's Get Centered

“Unless commitment is made, there are only promises and hopes: but no plans”

~ Peter Drucker

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3

Today's Session Goals

1. Discuss readiness of the organization- "A Plan?"
2. Think about if your organizational plans include "Agility"
3. Evaluate: Strategic Plan vs Strategic Model
4. Examine how Models are timeless, and flexibility is a necessity

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4



5

Let's take a poll on *Strategic Planning*...



6

🌐 When poll is active, respond at pollev.com/mraconferences250

📱 Text **MRACONFERENCE250** to **22333** once to join

Consider you company's planning process. Which answer best describes your enterprise?

Our enterprise has a formal strategic planning process looking out 3-5 years+ to determine our innovative pathway

Our enterprise does not have a formal strategic planning process, but we do set yearly goals and direction (operating plan).

Our enterprise does not have a formal planning process. We may meet as an executive group every few years to plan forward.

Our enterprise works best as a "reactive company". Very little to no planning is required.

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Planning.. It's a Good Thing, Right?



Organizational Planning- The Benefits

- 1. sense of direction
- 2. resource allocation
- 3. operational efficiency
- 4. standards to achieve

What else?

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COVID 19 : When the "World" Shut Down...



Supply Chain Interruptions

Sales Pipeline Disruption

Workforce Redirection

Cashflow Scare

The Great Resignation

Workforce Mental & Physical challenges

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Table-Talk Break-out



1. Did your company stay true to their Strategic “Plan” during Covid, or did they flex?
2. When or how did you know you needed to be more agile?



Let’s hear from a few of you...

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10

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Does the Organization Plans include Agility?
Karen

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11



Consider This Type of Thinking...

“Agility is your stability in ambiguity.”



“You should ‘Plan’ for your agility.”

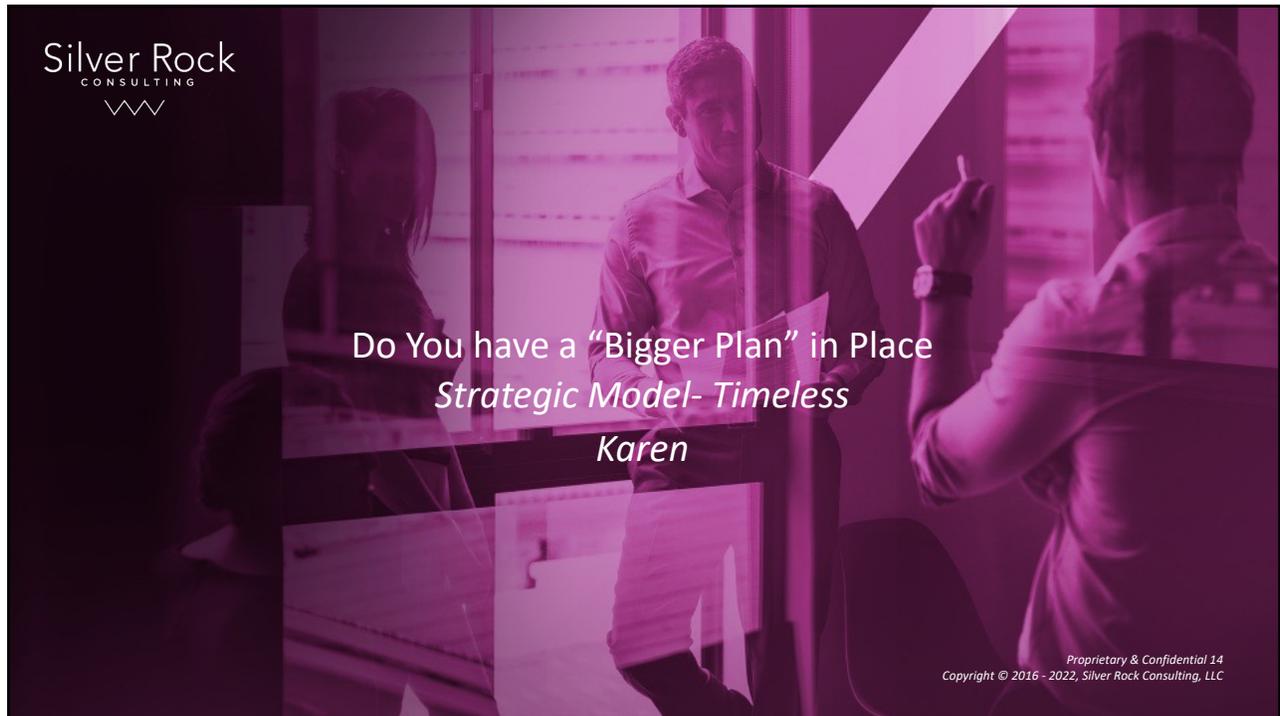
12

Agility:
*Ability to pivot,
quickly!*

1. Old “ways” are no longer working
2. Crisis brings in question the plan
3. Don’t throw the “baby out with the bath-water”

Question: Do you have a bigger plan in place?

13



14

Strategic Planning vs Strategic Framing



1. Tends to be a linear process
2. Defined beginning and end
3. Traditional thinking, very logical
4. Financially motivated, can be rigid

Strategic Plan





1. Dynamic and Disciplined
2. Timeless
3. Evokes creativity, what could be, transformative
4. Allows for adaptability and agility

Strategic Model





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A Strategic Framework (Model)

A framework serves as the foundation for decision-making and strategic direction, organizing all priorities and initiatives into drivers or pillars that ladder up to a high-level vision and purpose.

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Consider the Business Planning Hierarchy

- Strategic, high-innovation thinking : Vision
- Creates future direction for the *Enterprise*: Strategic (Pillars)
- Guides decision-making into the future: Timeless

Logical Thinking •
Sets Future Financial Expectations •
Timebound (2-3 years) •

- Tactical Plans
- Essential Financial Measures
- Goals and Direction for 12 months

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17

Let's take a poll on *Strategic Direction*...

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18

Q2: Consider the overall state of the company you work within. Which statement best describes the Enterprise:

1. Our Enterprises' "Strategic Plan" process is more of a financial exercise verses exploring an innovative strategic direction.
2. Our Enterprise is constantly in "Fire Fighting" mode and have not taken time to consider where our *New Next* should be.
4. Our Enterprise may not have a formal "Strategic Plan", but I feel comfortable we have an exciting, clear strategic pathway.
5. Our Enterprise is not growing at the right trajectory. We need to innovate and transform.
6. Our Enterprise is following a well laid-out "Model/Strategic Plan" and am confident in our strategic direction.

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19

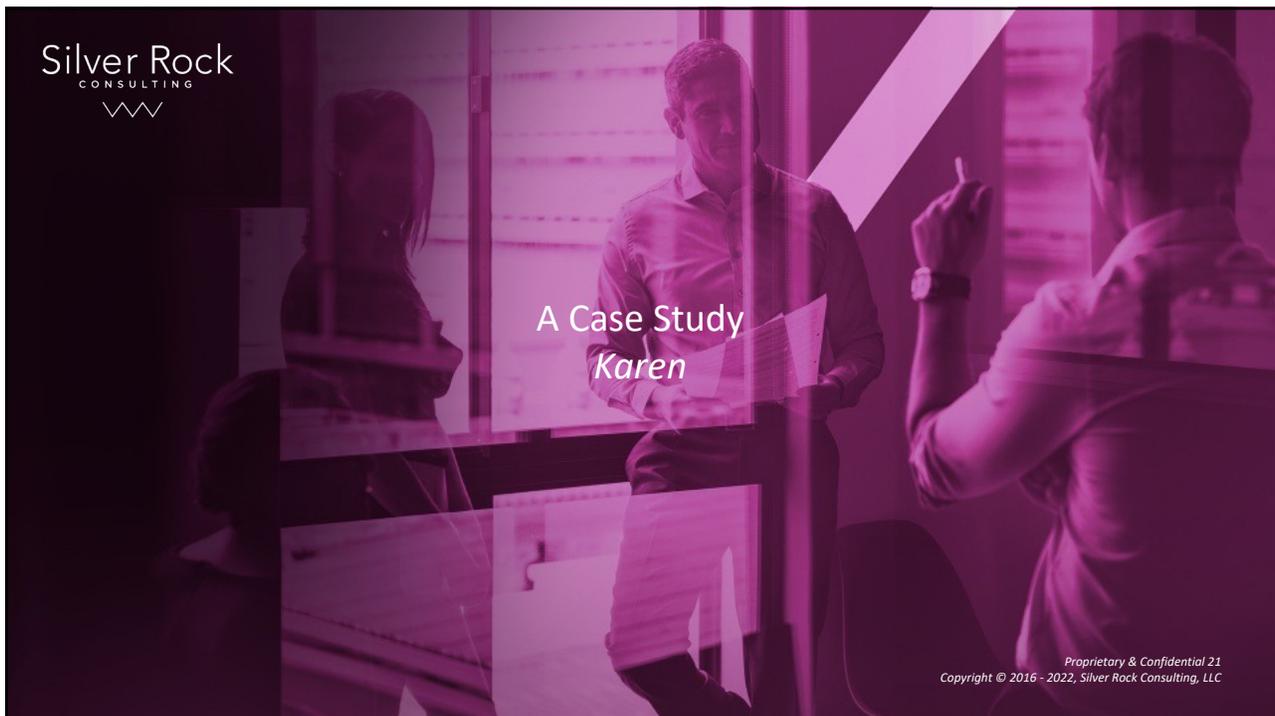
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Consider the overall state of the company you work within. Which statement best describes the enterprise?

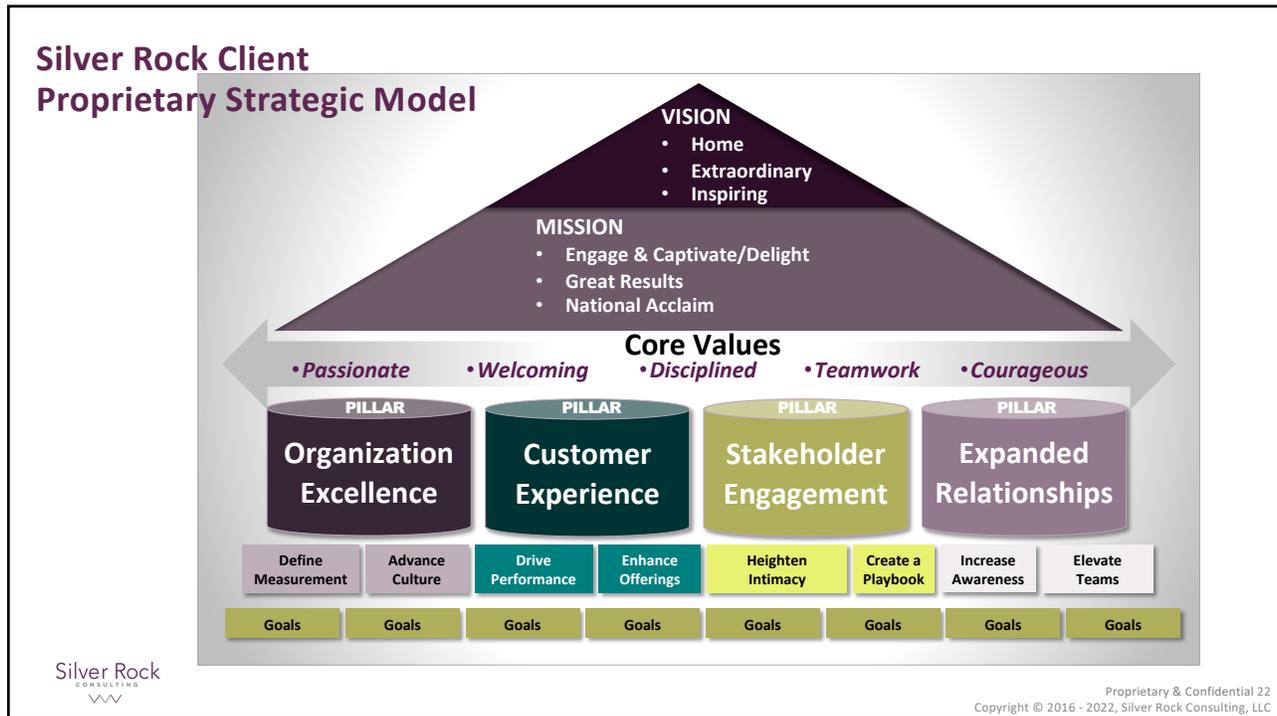
- Our enterprise's "strategic plan" process is more of a financial exercise versus exploring an innovative strategic direction.
- Our enterprise is constantly in "Fire Fighting" mode and have not taken time to consider where our New Next should be.
- Our enterprise may not have a formal "Strategic Plan," but I feel comfortable we have an exciting, clear strategic pathway.
- Our enterprise is not growing at the right trajectory. We need to innovate and transform.
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21



22

Now What ... So What?!

- 1. Discipline & Credibility:**
Grew approximately 10x Financial Asset Base
- 2. Agility During Covid:**
Innovation and ingenuity
- 3. Agility on Tough Decisions:**
Talent and organization

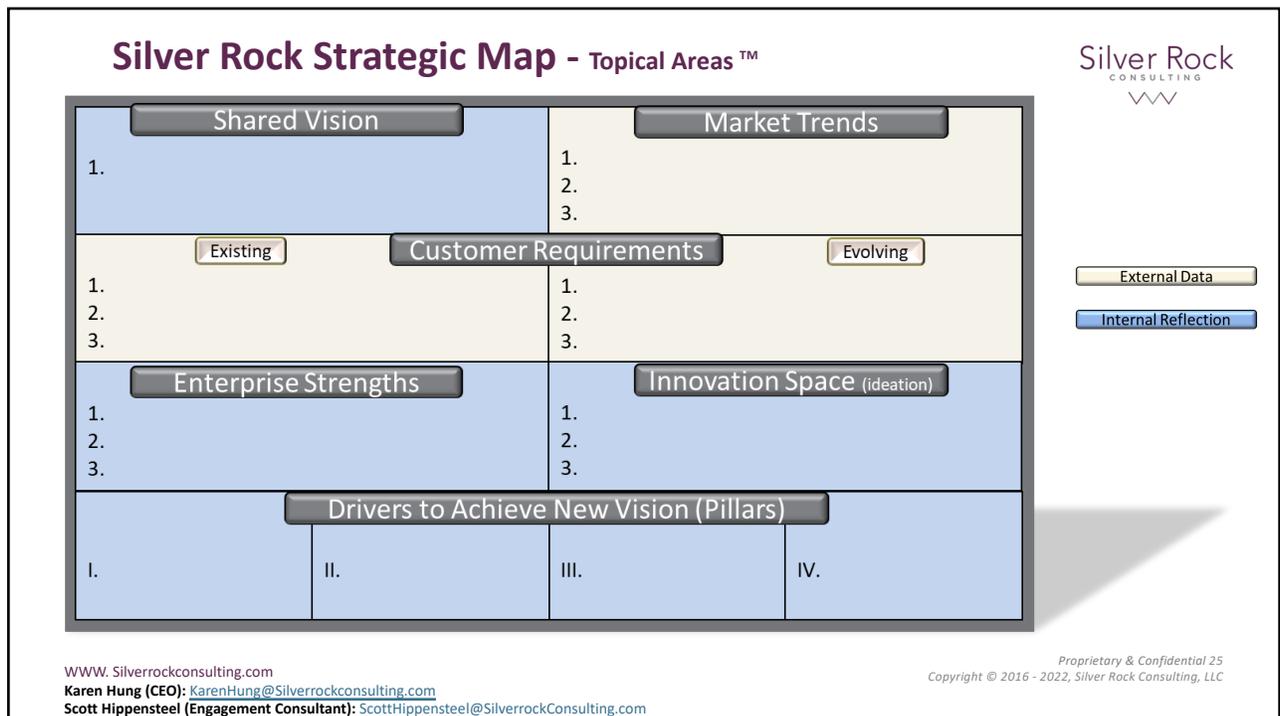
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23

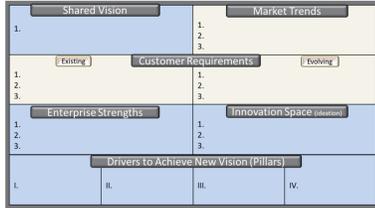


24



25

Table-Talk Break-out



1. Fill in as much as you can!

How was this experience for you?

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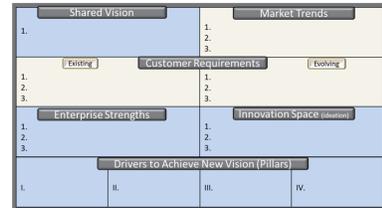
The Challenge...
“Do We Need A Strategic Model?”
 Karen

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Macro Application



- 1. Write down 1-2 advantages of a strategic model for your organization



Let's hear from a few of you!

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“Agility is your stability in ambiguity.”



“You should ‘Plan’ for your agility.”



“A Strategic Model can be Your Agility and Stability”



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29



30



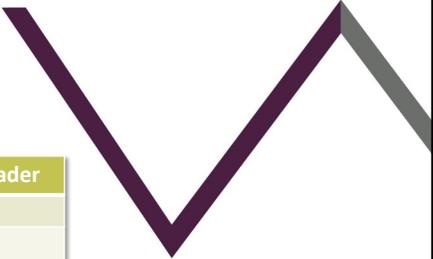
31



“What’s the Plan?”

Agenda

July 26, 2022



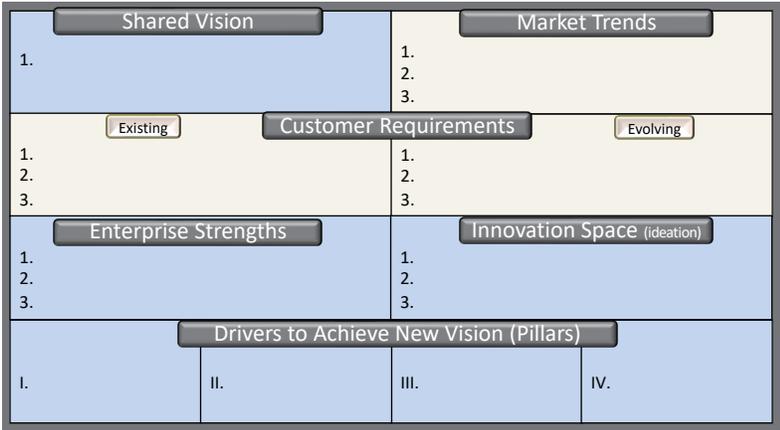
Time	Topic	Leader
5min	Welcome/Introduction/Reflection	Karen
5min	Setting Stage: • Roadmap/Goals for our Time/Agenda	Scott
10min	Readiness of the Operation- “A Plan” • Definition • Table Talk	Scott
5 min	Does the Organizations Plans include “Agility”? • Definition • When?	Karen
15min	Putting a Bigger Plan in place: • Strategic Planning vs Strategic Thinking • A Strategic Framework (Model) • Client Model Example	Karen
10min	Strategic Map	Scott
5 min	Challenge/Close out	Karen

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32

Silver Rock Strategic Map - Topical Map™





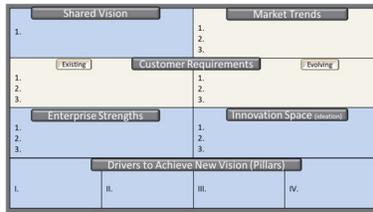
External Data

Internal Reflection

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33

Table-Talk Break-out



1. How does your organization approach collecting and understanding market trends and customer needs?
2. As an Enterprise, how do you evaluate data from question #1 to formulate new innovation concepts?



Let's hear from a few of you...

34

Provocative Thoughts....



1. Is the business' *Strat Plan* process a financial exercise, verses a strategic direction?
2. Is the business in constant "Fire Fighting" mode and has not taken time to consider where's its *New Next*?
3. Is the business stagnant because the direction is "comfortable"?
4. Is it time to transform?

IF ANY OF THESE ARE "YES",... consider a new *Strategic Model*

35

Strategic Pillars

Stakeholder Engagement

Stakeholders are defined as individuals, corporations, foundations, and other giving entities.

Silver Rock: Staff to define stakeholder segments with greater specificity to ensure development tactics are highly targeted and yield optimum impact.

Expanded Relationships

Expanded Relationships refers to organizations that {CLIENT NAME} collaborates with to accomplish its Mission.

Silver Rock: {CLIENT NAME} Staff to use discrete criteria for identifying business relationships in which collaboration is mutually beneficial.

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36

Strategic Pillars

Organizational Excellence

Excellence is aspired both technically and organizationally. Proficiencies and creativity are inherent in excellence, both of which are necessary to achieve {CLIENT NAME} Vision.

Silver Rock: {CLIENT NAME} Staff to define how “Organizational” Excellence is measured.

Customer Experience

Customers are defined as consumers and businesses who have attended a {CLIENT NAME} event. {CLIENT NAME} will defer to the Consumer Segments developed from the Brand Strategy.

Silver Rock: {CLIENT NAME} Staff and/or SPTF Sub-team to define Business Segments in greater detail.

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37