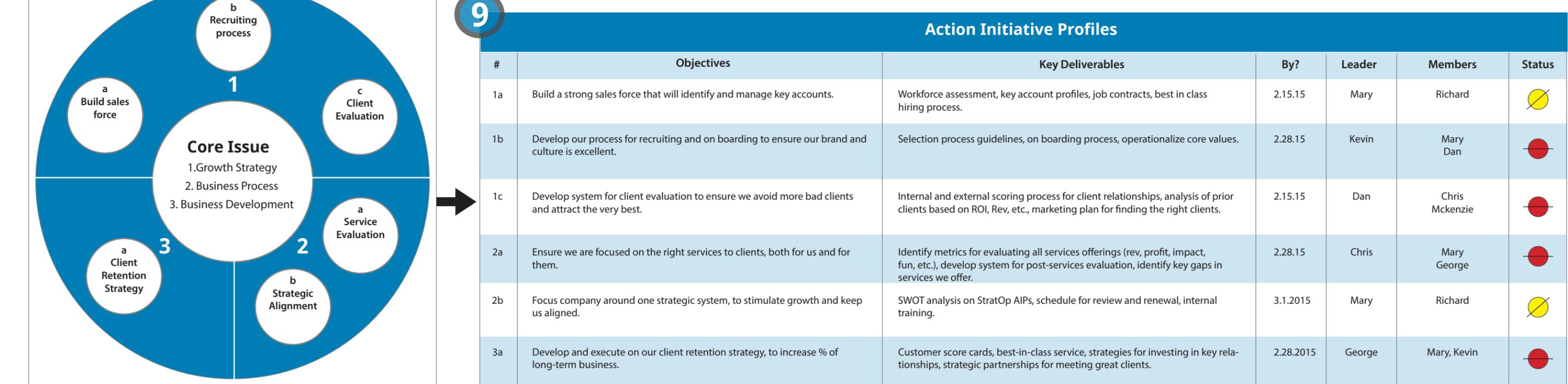
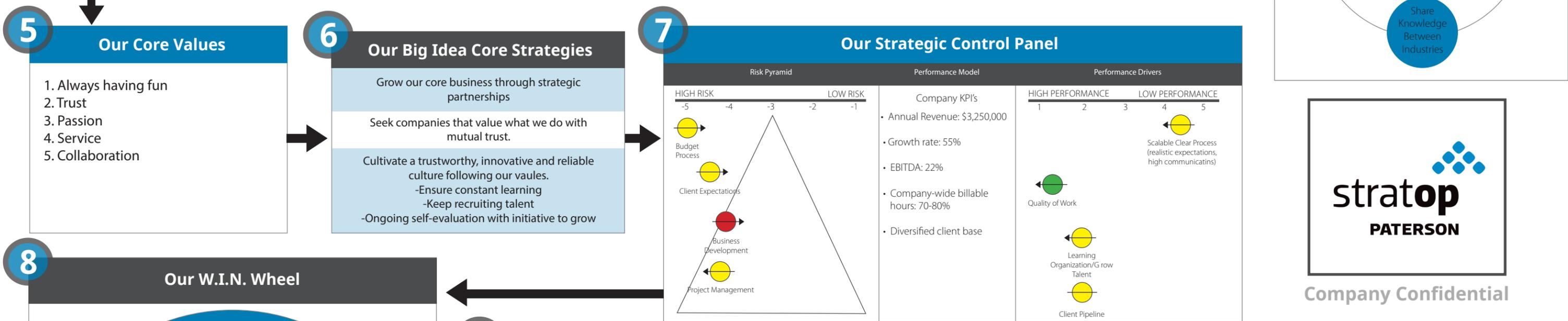


Your Company Plan On A Page



Company Confidential

The StratOp Process

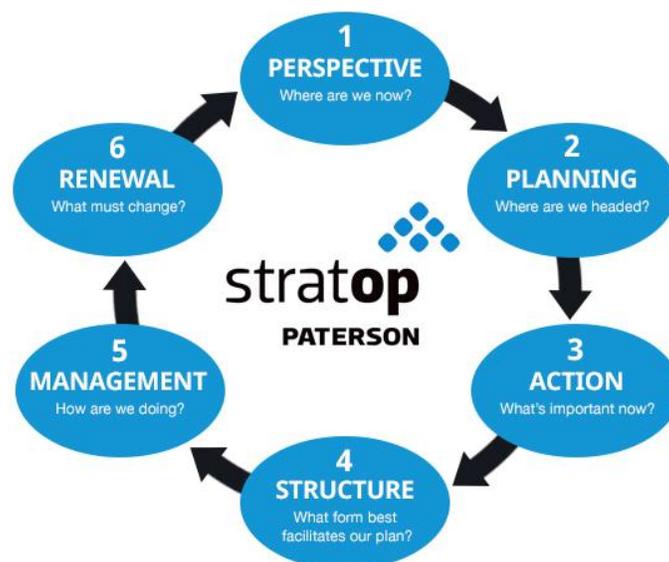
What is the StratOp Process?

StratOp is a powerful and proven process that helps grow successful organizations. Most small and mid-sized organizations operate without a central plan. The result is inefficiency, and the inability to maximize potential. With StratOp, the entire team will be focused around the same unique mission, vision, and goals, having a clear plan to make reaching those goals a reality. StratOp is a team-discovery process, that:

1. Gives perspective on all strategic, financial, and operational parts of the organization
2. Helps the organization to know *where it stands*
3. Clarifies *where it should go*
4. Provides a customized plan on *how to get there*

The word “StratOp” blends two words vital to a successful strategic planning process. “Strat” stands for *strategic*, the art of planning for tomorrow, today. “Op” stands for *operational*, the discipline of managing today, today. Weaved through the entire process is a third component – the *financial*. Both strategy and operations must be financed. The StratOp Process is a comprehensive system that brings together all three of these elements

The StratOp Process guides a leadership team to gain full perspective of all internal and external realities. It ensures the team crafts a core plan and strategy that emerges from the gained clarity, to focus on *What Is Important Now* to move towards the clarified vision, and to create a plan that can be measured, incrementally installed and adapted to internal and external change. Six phases flow through the StratOp Process and, when worked, become an ongoing cycle of renewal.





Phase 1: Perspective - Where Are We Now?

The StratOp Process begins with *Perspective*. “Perspective before planning” is key to success. If you have the right perspective, the core plan almost writes itself. Perspective is the result of finding truth and new realities before they have happened. StratOp uses a variety of tools necessary to help gain the perspective on all the critical organizational issues. These tools include:

- Turning Point Profile: How we got to where we are
- 4 Helpful Lists: Where we are now
- Patterns and Trends Analysis: Internal/external patterns and trends and their implications
- Opportunity Mapping: Understanding the life cycles of products and services, identifying opportunities to seize, and assessing opportunities and risks
- Performance Drivers: Identifying and assessing vital drivers of success
- Risks and Constraints: Identifying and assessing those things that can paralyze the organization

Phase 2: Core Plan – Where Are We Headed?

Once a team has found today’s truths and tomorrow’s truths (perspective), then the team has the wisdom to develop a living *core plan*. The team will also have a rationale for its core plan, as well as a set of shared fundamental beliefs upon which to develop this plan. Asking the question, “Where are we headed?”, the next phase is to build the core plan from the perspective gained in Phase 1. These core plan components include:

- Core Assumptions: Strategic, operational, and financial assumptions summarized from the perspective gained
- The Strategic Control Panel: Like a dashboard on a car’s driving panel, a control panel is created to be managed regularly
- Life-Generating Cycle: Clearly understanding who the primary customer is and what they value
- Purpose: Crafting a clear, crisp and compelling statement of why the organization exists.
- Vision: Identifying clearly where the organization is headed
- Core Values: The irrefutable foundations for how the organization operates
- Big Idea Core Strategies: The distinctive statements of strategy that set the organization apart from all others

Phase 3: Action – What’s Important Now?

After Phase 2, the team has now recognized the issues and are ready to move forward as one group. This is one of the key benefits of the StratOp Process: *breakthrough becomes horizontal (cross functional) and involves the whole team*. The team-developed core plan serves as the basis for creating a unified *action* plan. Individualized departmental plans can later be developed to align with the master plan. StratOp uses the following tools to launch and install the plan...



- The W.I.N. Wheel: Identifying “What’s Important Now?”
- Action Initiative Profiles: Each action initiative is profiled, creating parameters of clarity for cross-functional teams
- Champions, Team Leaders, and Team Members: The creation of cross-functional teams that work together to plan and meet the objectives of their assigned initiative
- Situational Analysis: identifying the strengths, weaknesses, opportunities, and threats of each action initiative
- Action Initiative Plans: Action steps extracted from each situational analysis
- Action Initiative Plan Scrubs: Each plan is scrubbed by the leadership team for clarity, sign off and release
- Dovetailed Timelines: All timelines are integrated and assessed for operational and financial capacity
- Plan Launch and Install: The plan is officially launched

Phase 4: Structure – What Form Best Facilitates The Plan?

Structure should follow substance. The overriding purpose of structure is to ensure that the right decisions get made in a timely way. With a core plan and its resulting action plan (substance) in place, the structural requirements needed to implement will be addressed. If a fundamental shift to adjust the business to changed circumstances is part of the plan, there will be major structural change required. Jay Hidalgo will facilitate and coach on the following...

- Structure Design Boundaries: The lead team agrees on the design principles
- Organizational Design: 2-3 executives work on designing the structure that best supports and facilitates the core plan
- Culture Assessment: All hiring and management practices are filtered through the core values
- Systems and Processes: Vital systems are identified, updated and managed
- People Development Plan: Building self-sufficient, high-performance teams is the goal

Phase 5: Management – How are we doing?

The StratOp Process affords a way of providing ongoing, regular feedback to help *manage* core and action plan implementation. Asking the questions related to “How are we doing?”, teams learn how to manage the following components of the plan:

- Managing the Wheel of Action: The organization-wide W.I.N. wheel is managed every six weeks or so, depending on the organization
- Managing “Reds”: The entire StratOp system has a “red-yellow-green” rating system. Reds (risk areas) are managed feverishly
- Managing Performance Drivers and Risks: The team works to leverage performance drivers, and to mitigate risk (both internal and external)

Phase 6: Renewal – What Needs To Change?

In the StratOp Process, renewal is addressed very specifically in two special senses:

1. Recognizing when the old strategy is simply worn out and a core plan based on a new strategy must be developed
2. Consciously embedding renewal into plans and operations for progressive adaptation.

Teams learn how to manage the following components of the plan through the following tools:

- Renewing the Wheel of Action: At times, the W.I.N. wheel must be renewed after specific initiatives become healthy. Then, new initiatives are added.
- Sensing and Seizing Opportunity: New opportunities that emerge must be identified and seized.
- Renewing Life Cycles: Decelerating life cycles must be renewed or terminated.
- Responding to New Patterns and Trends: Constant adaptation to new trends, both internal and external, keeps the organization relevant.
- Renewing the Core Plan: Annual full plan reviews and renewals keep the team constantly adapting and relevant to the ever-increasing rate of change.



How Does It All Work?

Round 1: Jay Hidalgo gathers with the top-tier leadership team for the initial 3-day StratOp planning process. During this time, the first 1½ days are spent gaining perspective and clarity through the tools listed in the “Perspective” phase of the StratOp Process. Then the core plan (from this Perspective) is created in the next 1½ days. By the end of these three days, StratOp plan “Champions” and “Team Leaders” are released together with their team members and perform situational analysis and create first-draft action initiative plans for all initiatives on the W.I.N. Wheel. After this round, a “Plan-On-A-Page” is created, as well as an underlying “Playbook” that can be duplicated and distributed to all leaders.

Round 2: Jay Hidalgo will return approximately 6-8 weeks after Round 1 for a two-day process meeting with each cross-functional team and the leadership team to review each team’s work, to “scrub” their plans (looking for comprehensiveness, sequential thinking, realistic timelines, and budget-alignment), and to prepare the implementers to launch and install the new plan.

Round 3: Jay Hidalgo will return for a one-day plan review with the leadership team (4 weeks after Round 2) to coach on how to facilitate a monthly plan review. He will also begin discussion and planning for the annual StratOp renewal process.

Quarterly Reviews: Jay Hidalgo will return every three months for a one-day quarterly plan review with the leadership team.

Annual Renewal: Jay Hidalgo will conduct a 2-day annual renewal of the StratOp Process. The process will be similar to Round 1.

Jay Hidalgo will be available throughout this entire process by phone or e-mail to answer any questions on managing the StratOp system in the day to day.



Jay Hidalgo's Role As Facilitator:

Jay Hidalgo's role is to serve as a strategic facilitator. In having Jay Hidalgo facilitate the StratOp Process, your company will be adding a true partner to the team, not merely someone dispensing information. As facilitator, Jay Hidalgo and StratOp are *the process*. Your company is the *content*. The goal is to guide the team to breakthrough and growth.

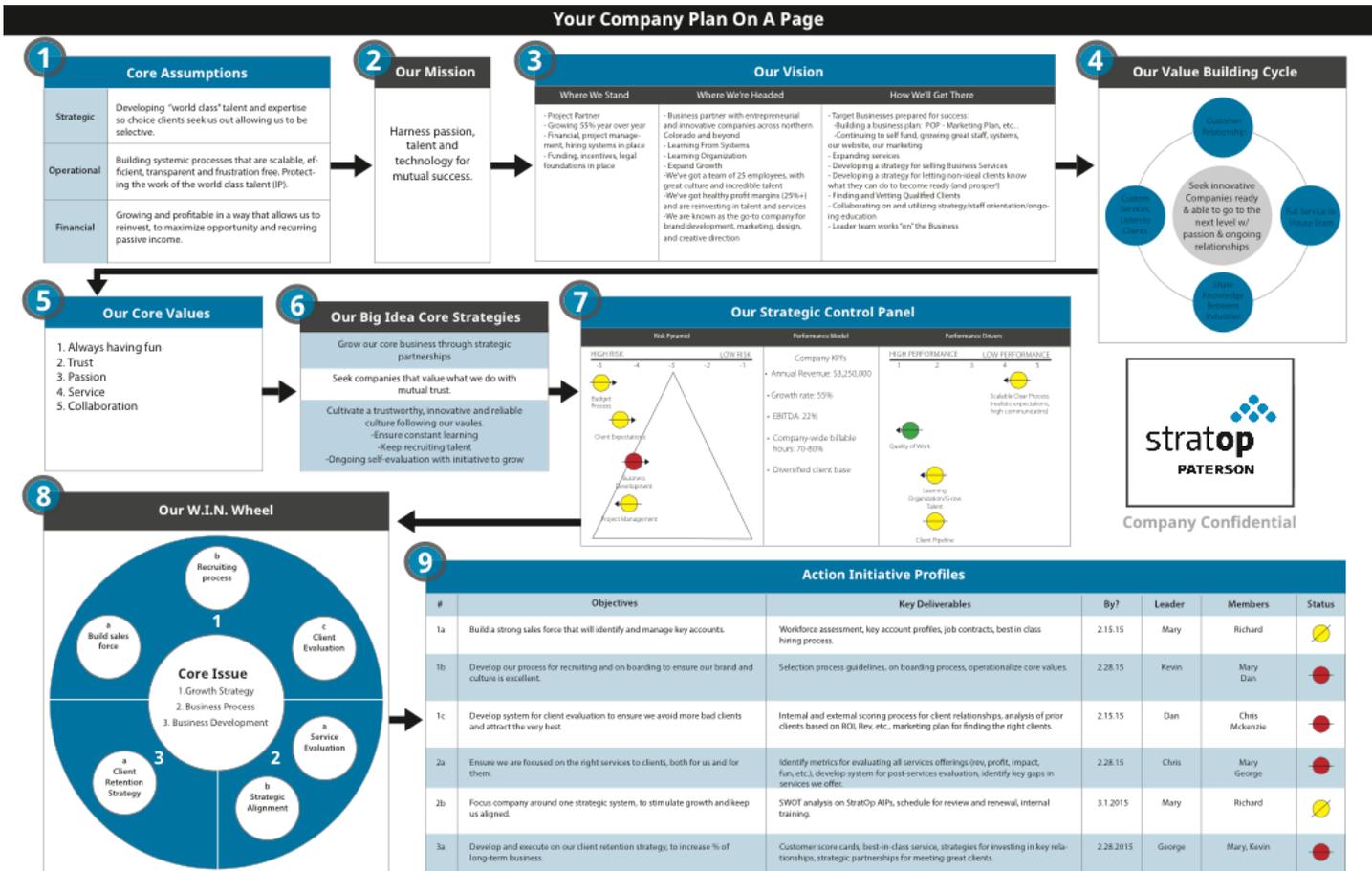
What Each Company Receives

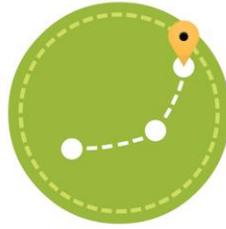
Your company gets a ready-to-install, customized strategic-operating plan, both in a Plan-On-A-Page format and with a supporting Playbook (hard copies and/or electronic formats). In addition, your company will realize unity and alignment in leadership, clarified roles, and a plan to move towards the company vision. All of this while at the same time, resourcing the staff to tend to the operational realities they face. In summary, your company will have a new system to manage and integrate the strategic, operational and financial components of the organization. Over time, your company will become self-sufficient in managing the plan and adapting to new realities as the future unfolds.



Plan-On-A-Page Sample

The StratOp Process manages the enterprise as one system from a Plan-On-A-Page (POAP) format. A sample is shown below. Each Plan-On-A-Page has an undergirding playbook – including all perspective tools, all action initiative plans, and all structure components.





JAY HIDALGO
BUSINESS & LEADERSHIP
COACHING

The Four Helpful Lists

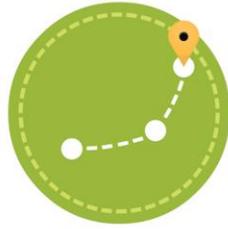
Below, you will find The Paterson Center's "Four Helpful Lists." Asking "What is right?", "What is wrong?", "What is confusing?", and "What is missing?" can help your team gain perspective on important strategic, operational and financial core issues. In this exercise, we want to...

- Optimize what is Right
- Change what is Wrong
- Clarify what is Confusing
- Add what is Missing.

Use the tool on the following page to guide your thinking from a macro or birds-eye view in applying these four questions to your organization.

As always, if I can be of help to you and your company, feel free to email me at jayhidalgo@jayhidalgo.com, or call me at 616-710-1282.

Thanks,
Jay



JAY HIDALGO
BUSINESS & LEADERSHIP
COACHING

What's Right? (Optimize)	What's Wrong? (Change)	What's Confusing? (Clarify)	What's Missing? (Add)
<ul style="list-style-type: none">•	<ul style="list-style-type: none">•	<ul style="list-style-type: none">•	<ul style="list-style-type: none">•

The Eisenhower Matrix



Dwight D. Eisenhower was the 34th President of the United States from 1953 until 1961. Before becoming President, he served as a general in the United States Army and as the Allied Forces Supreme Commander during World War II. He also later became NATO's first supreme commander.

Dwight had to make tough decisions continuously about which of the many tasks he should focus on each day. This finally led him to invent the world-famous Eisenhower principle, which today helps us prioritize by urgency and importance.



<https://www.eisenhower.me/eisenhower-matrix/>

The Eisenhower Matrix



How to Use The Eisenhower Matrix

Prioritizing tasks by urgency and importance results in 4 quadrants with different work strategies:

1. We call the first quadrant *Do first* as its tasks are important and need to be done today or tomorrow at the latest.
2. The second quadrant we call *Schedule*. Its tasks are important but less urgent. You should list tasks you need to put in your calendar here.
3. The third quadrant is for those tasks you could *delegate* as they are less important to you than others but still pretty urgent.
4. The fourth and last quadrant is called *Don't Do* because it is there to help you sort out things you should not be doing at all.



For more detail, go to <https://www.eisenhower.me/eisenhower-matrix/>



Patterns and Trends Analysis

Purpose of This Tool

While we often notice the change in the world around us, we rarely are in tune with the implications. This tool helps the team to look at the changes, observe the future in light of those trends and then find convergence by identifying what needs to change.

How It Works

We first identify patterns and trends. Examples include demographics, channels, families, education, government and politics, competition, economy, etc. Allow the team to discuss the external patterns and trends that are causing outside pressure on the organization, its products/services, or its direction. Once you have captured these insights, ask the team to extrapolate these trends into the future and identify where they are headed. Guide the leadership team to identify the future result if the trends carry forward and what needs to change in order to take advantage of future opportunities or to avoid future pitfalls.

Patterns/Trends	Where It's Headed	What Must Change

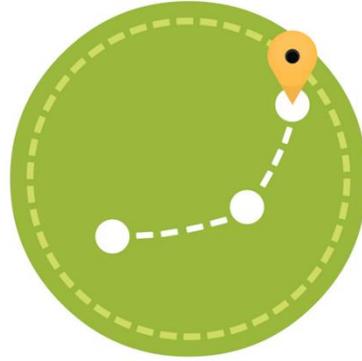




Start – Stop - Keep

- ▶ What will lead to success?
- ▶ What could get in the way?

Stop	Start	Keep



JAY HIDALGO
BUSINESS & LEADERSHIP
COACHING

A Simple Planning Tool

www.jayhidalgo.com



Instructions

- ▶ Use this tool as a basis for conversation with your leadership team.
- ▶ Address each column one at a time.
- ▶ Ask the questions, then identify summary statements for each question.
- ▶ For the “How Will We Get There?” question, avoid tactical planning. Focus on critical strategic steps necessary to help you get to the vision created in the second column.

Our Vision



Where Do We Currently Stand?	Where Are We Headed?	How Will We Get There?

Used with Permission from The Paterson Center, LLC.



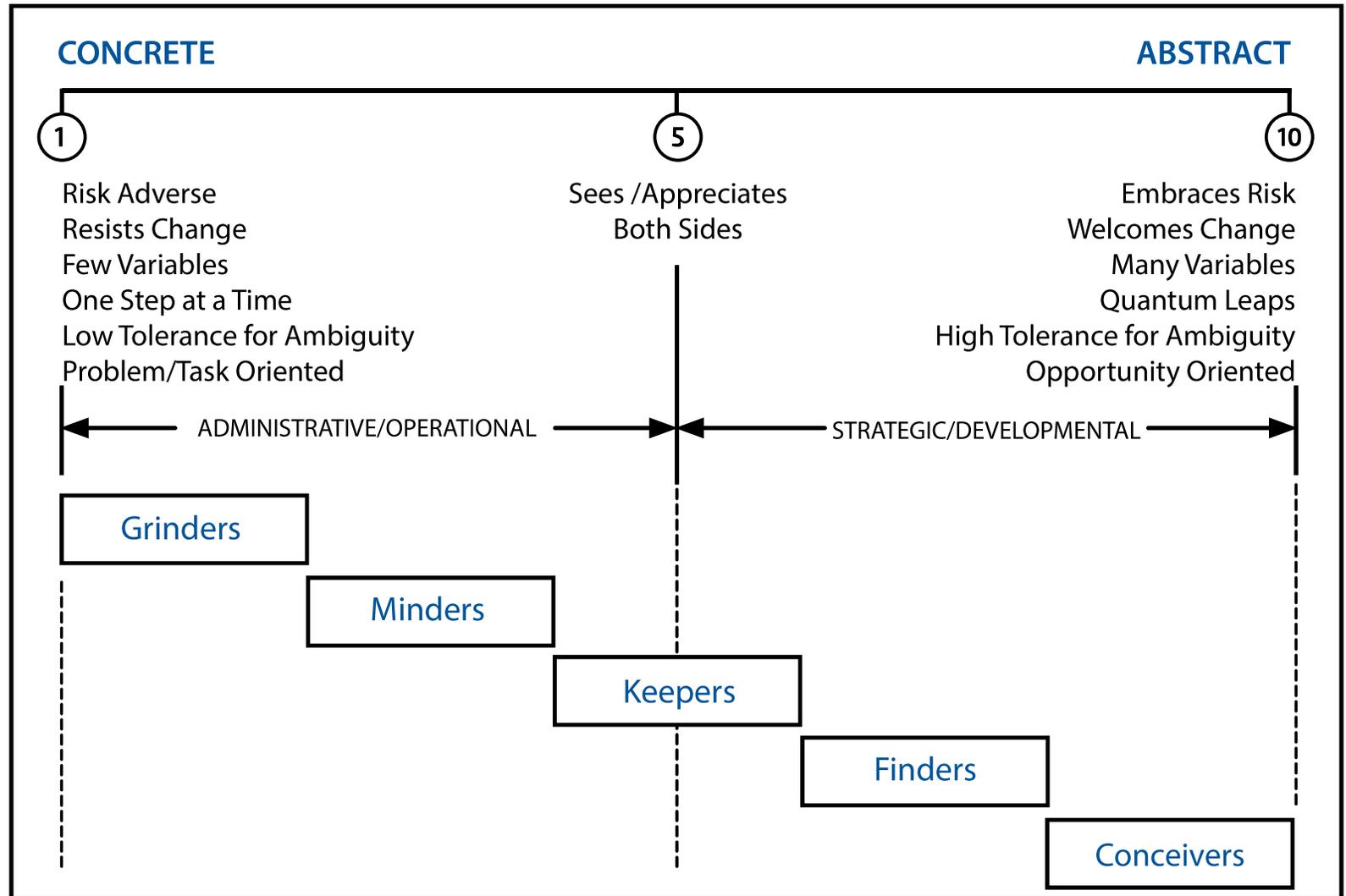
2



45 min



Thinking Wavelength



Perspective | Where Are We Now?

Thinking Wavelength

2



45 min

Purpose of This Tool

The purpose of this tool is to identify and help leadership understand the blend of concrete and abstract thinkers that are on their team. The tool also helps the team openly discuss each others wavelengths in a safe environment which leads to camaraderie and team building.

How It Works

Begin by asking the group the six questions. Have each person record their number score to each question, add up the total and divide by six. Then explain the history and contents of the tool. Ask them the one question (see background material on next page) and have them log their answer as a number next to their previous number. Then chart each team member's average between the two scores on the chart. Allow for the team to connect on each other's scores.



Facilitator Tips

1. Draw the chart prior to the session and then "revealing it" in order to tell Tom's story.
2. Ask the six questions, explain the tool and chart the final scores.
3. Discuss any voids and explain how the first two days are more abstract in nature and the third day is more concrete.
4. Discuss job description and personnel applications.



Thinking Wavelength

2



45 min



Facilitator Tips

The six questions:

1. On a scale of 1-10, identify your relationship to risk - in general. A "1" is very risk averse, will push back and lose sleep over risk. A "10" will embrace it with the snap of a finger. A "5" is in the middle. Where are you on a scale of 1-10?
2. On a scale of 1-10, identify your relationship to change. Similar to risk, a "1" resists change. A "10" will create change if it's not happening. A "5" is in the middle. Where are you on a scale of 1-10?
3. The next question is about how many variables, concepts, or ideas you can have swimming around in your brain at the same time before you tilt into stress. A "1" can only have a few at a time. A "10" can have a whole bunch of ideas and not stress out (note: this is not about multi-tasking). A "5" is in the middle. Where are you on a scale of 1-10?
4. If I want to take you from A-Z logically, a "1" will require that I go one step at a time: A to B, B to C, pause, C to D, etc. With a "10," I can take quantum leaps and they fill in the blanks: A to M to Z. A "5" is in the middle. Where are you?
5. On a scale of 1-10, what is your relationship to ambiguity? A "1" wants all ambiguity eliminated and will push for concrete illustrations, case studies, and examples. A "10" lives happily and proceeds with ambiguity. Where are you on a scale of 1-10?
6. Last, what is your relationship to opportunity? A "10" sees opportunity everywhere all the time. Opportunity they saw yesterday is completed in their mind (even though in actuality it's not!). A "1" sees problems and tasks associated with opportunity. A "5" is in the middle. Where are you on a scale of 1-10?

One question (after you explain the history and nature of the Thinking Wavelength).

1. If you had to pick one number on this spectrum to live with for the rest of your life, where would you be the happiest and contribute the most?

Thinking Wavelength

The 5 Types of Thinkers

2



45 min



Grinders

Grinders get the work done. They are detail-doers. Grinders document things, are risk-adverse, like few variables, take things one step at a time, have a low tolerance for ambiguity, understand tasks and the need to solve problems, handle administrative details well, and deliver working drawings. They do the same thing over and over again, year after year - and love it. If you change the way they do things, you will hear from them. The world cannot operate without grinders. By the way, real grinders are not offended by this term. They proudly grind it out, day after day.

Minders

Minders can manage a unit team, having both the people skills and the organizational abilities to do so. They can supervise the performance of work. They function best as frontline supervisors, have the ability to diagnose problems, “mind the store,” and put out “brush fires.” They can run a department, ministry or program and manage people in their area of expertise. They are usually supervisors, teachers, chief engineers, section leaders, ministry program leaders and foremen. They can be counted on to keep the processes and teams functioning and running well.

Keepers

Keepers are capable of managing the whole store, possessing an appreciation for the administrative and the strategic. They have both concrete and abstract thinking skills, but will be biased to the administrative/operational work.

Thinking Wavelength

The 5 Types of Thinkers

They make great mediators in conflicts, good personnel managers, directors of departments or ministry programs, plant managers, and executive assistants. They handle details and see the broader vision. They handle many variables, are organized, and good with people.

Finders

Finders are often entrepreneurs, in some form. They are abstract thinkers, so they oftentimes don't complete the paperwork that concrete thinkers require. They may appear to be loose cannons in a group structure. They are innovators and creators. Follow-through is not always their strength. They need grinders, minders, and keepers to follow in their wake of creativity. They sense and seize opportunities, spot voids and fill them, are bored by a steady state, are good site locators, love a new challenge, must be thrown "raw meat" regularly. They are usually the chief executive officer, chief visionary, lead pastor, leader of a major ministry, product or market manager, joint venture leader, and advanced development engineer. Unlike conceivers, finders want to ensure that their ideas work in the first-generation prototype. But once they are assured that it does, they must hand it off to a keeper to build upon and find something else to find.

Conceivers

Conceivers are usually bright, articulate and persuasive, but they don't bring things to closure. They work best in universities, seminaries, and pure research laboratories. They don't belong in business. They cannot manage others well, and their ideas rarely become commercialized or brought to the masses. They are oftentimes criticized for "all talk and no follow through."



45 min





45 min



Thinking Wavelength

The 5 Types of Thinkers

They embrace risks, draw little sketches, can make quantum leaps, welcome change, are strategic, produce seminal concepts, enjoy many variables, are opportunity oriented, have a high tolerance for ambiguity, postulate the new (but don't execute), and love the forty-thousand-foot-macro-view. Conceivers are theorists typically employed as researchers, philosophy professors, theologians, and innovators.