"Leading From an Emerging Future: A Process for Creating and Leading"

By Pauline Bartel, M.A.

The future is now, and many companies and organizations struggle with developing strategic plans that can deal with a make-or-break horizon that is getting closer and closer every year. Struggle no more, says Ray Patterson of Capital Consulting Group.

Patterson helps clients construct an organizational vision, set goals and priorities and develop an action plan, seemingly at warp speed as compared to strategic planning methods of the past. How does Patterson do this? He combines his skills as a trained strategic planning facilitator with revolutionary computer software: AMCat, which was developed by Dr. Michael Thorne Kelly of Advanced Management Catalyst Inc.

By understanding the six steps necessary for creating wise decisions and efficient, goal-directed activities and by expertly leading clients through the process, Patterson effects "a high-speed interface between creative thinking and productive action." The six steps include:

- **Step One: Creating the Vision**

Creating the vision requires participants to gaze into a metaphorical crystal ball. After identifying a future date, they are asked to describe in simple, yet specific detail the aspects of that future they wish to create for themselves. Everyone contributes, and the descriptions are captured in a computer-generated vision document, which is displayed on-screen for all to see. Then each word, sentence and paragraph is revised until all participants are ready, willing and excited to sign their names to the vision and commit a portion of their lives to making it a reality.

In 2007, more than 100 citizens of Wallaceburg, a community of Chatham-Kent in the Province of Ontario, Canada gathered together to create a vision for an area that had experienced hard times and loss of its identity.

Hard times had hit with the loss of more than 3,800 high-wage manufacturing jobs over two decades. Loss of identity resulted when Wallaceburg – a self-sustaining community of more than 10,000 citizens – was amalgamated into a larger Municipality of more than 100,000 residents. To re-focus Wallaceburg residents, a task force was formed to create "a more positive outlook for the future as opposed to the reality of the now," according to Stuart McFadden, Project Manager of the Wallaceburg Community Task Force.

Capital Consulting Group, LLC, was engaged to guide the strategic planning. The organization led an interactive, community-inclusive, three-day facilitated process. During the process, lead facilitator Ray Patterson helped turn the focus of participants from what they had lost to what remained that they could build upon. The result was the creation of "Wallaceburg Community Vision 2020."

"We now have people engaged, working towards common goals," according to McFadden. "Creating the vision gave us something we can focus on. That is, what Wallaceburg can be if residents choose to play roles. If we choose to play roles, we can make tomorrow better."

- **Step Two: Brainstorming Options**

With the vision completed, participants next brainstorm the ideas and actions they think will assist in making the vision a reality. No idea is considered unimportant. All the brainstormed ideas are captured and documented using the AMCat software, specifically designed to assist the facilitation team. At the conclusion of the brainstorming, participants assess the collected ideas then select specific ones they will work on to transform the vision to reality.

After being hired as the Director of the National Center for Aerospace Leadership, Robert Mansfield realized the need for creating a vision and strategic plan for the newly created organization. According to Mansfield, the standard practice of "taking a few weeks and using butcher paper, sticky notes and flips charts to create a vision and a strategy is so time consuming." Instead he turned to Capital Consulting Group. "Ray and his colleagues have an automated way of moving through a definitive process so it can be done quickly."

Twenty-one staff members of the National Center for Aerospace Leadership participated in the strategic planning process over a three-day period. In the brainstorming phase, expectation setting, facilitation and some participant conversation were preludes to idea generation in various topic areas.

"Doing brainstorming using a computer with groupware capability makes it possible to sort ideas in various ways," Mansfield says. "People can think without being distracted by others talking but can also see what other people are writing, which may trigger additional ideas as well. This also adds to the richness of the conversation."

Argument in the classical sense and disagreement are parts of the process, according to Mansfield. "The process and facilitation Ray uses drives the team to consensus. No one is forced to agree, but because the team is focused on achieving the outcome – strategy and an action plan – consensus is achieved. At the end, we all felt like we had created something that made sense to us, that we were

comfortable with and that we could move forward on. We had a framework in which to operate."

- **Step Three: Organizing, Identifying and Establishing**

In this step, with the assistance of the AMCat software and the lead facilitator, participants organize the brainstormed ideas into logical groupings; identify the outcomes the ideas are meant to achieve and establish that the various groupings of outcomes are distinct from each other.

The Board of Directors and staff of the Economic Development Corporation (EDC) Warren County began their strategic planning process during a retreat facilitated by Capital Consulting Group.

After creating the vision and brainstorming options for a five-year strategic plan, participants continued the process subsequently at Board meetings and via a collaboration Web site set up by Capital Consulting Group. Organizing ideas, identifying outcomes and establishing distinct outcome groupings were key components that delivered an unexpected outcome, according to EDC Warren County Executive Director Len Fosbrook. "It brought us to understand the type of organization we are," he says. "We are a knowledge organization made up of individuals, and we function better by operating in teams. The team coordinator can be anyone in the organization."

Developing the strategic plan has been effective for EDC Warren County, according to Fosbrook. "Ray Patterson had the right magic. We're a more cohesive group; people feel better about being part of a team and feel better about their contributions."

- **Step Four: Prioritizing**

Once organized into different strategic-level objectives, the ideas are prioritized through use of "forced choice" or "pair-wise comparison" to determine the true priority of the objectives. This step identifies what is holding the organization back at any given moment in time and determines what must be accomplished for the organization to begin to realize its vision.

The Board of Directors of Saratoga P.L.A.N. (Preserving Land and Nature) generated 97 ideas in a brainstorming session facilitated by Capital Consulting Group. Ray Patterson led the Board members through a forced-choice comparison of objectives using the AMCat software that presented the options and allowed members to vote on each option pair through a show of hands.

According to Lisa C. Nagle of Elan Planning & Design, Inc., Vice Chair of Saratoga P.L.A.N.'s Board of Directors and chair of the Planning Committee: "We saw how

that dream list of ideas could be organized and prioritized, which provided direction and clarity on the vision and purpose of Saratoga P.L.A.N. and the tasks we can do as an organization. Without Ray's skilled facilitation and the aid of the software, I don't think we could have achieved what we did in one day. Ray allowed us to find consensus quickly and efficiently." As chair, Nagle has brought the planning-oriented ideas to the Planning Committee for refinement.

"Having Ray come into our organization was a welcome opportunity because he's good at feeding back the information important to us. Using the software makes his process even more powerful," Nagle says. "We have a strategic vision now that we never had before, and I now see 97 prioritized things that Saratoga P.L.A.N. can do."

- ▪ **Step Five: Staging Accomplishments**

In this step, participants determine where each objective is in its lifecycle from thought or idea, through planning, resourcing, initial implementation, gaining feedback, through reaching independent momentum, through completion.

The Board of Directors of the New York State Capital Region Chapter of the American Payroll Association had elected new officers. "We had a lot of ideas of what we wanted to do, but we didn't know quite how to pull it all together and build a distinct direction," according to chapter coordinator Jim Pfeiffer, President of Pfeiffer & Associates, LLC/Time Plus Payroll," so we turned to Capital Consulting Group to help us develop a vision and a direction."

During two Saturday sessions, Board members met with facilitator Ray Patterson who led the group through the various steps of the process. After prioritizing the objectives, participants determined through consensus the accomplishment staging of each objective on a 0 to 10 scale. Precise characteristics define each stage. For example, at Stage 0, "We are opening ourselves to new possibilities in connection with our vision." At Stage 4, "We are gathering the means to turn the plan into reality." At Stage 9, "We are continuously improving our processes and products." With Patterson's help, the Board moved quickly through the staging step, according to Pfeiffer.

"Ray has a way of listening to information and nudging one way or the other based on how he sees things. That's where his expertise comes in," Pfeiffer says.

After the accomplishment stage of each objective was plotted on a diagnostic matrix, the Board had a clear visual of objective priorities, critical constraints and the context for subsequent action (i.e., research, development, implementation or production) aimed at fulfilling the vision.

"This is a well-organized and easy process," Pfeiffer says. "Sure you've got to put the time in, but going through this really helps you get focused or re-focused on the direction you should be heading in as a company or an organization."

- **Step Six: Leading the Implementation**

The final step is leading the implementation. Collaboratively, participants organize the options within each objective into projects, prioritize the projects and assign the responsibility for each objective to a specific individual.

Having a list of projects and knowing who is responsible for each has been key for giving momentum to some projects and accelerating others, according to Eric Hamilton, chair of the Mohawk Towpath Scenic Byway Coalition (MTSBC).

In 2007, the Coalition's highest priority was "Refine Internal Operations." The organization realized that in order to be successful, certain processes, such as grant administration, needed to be defined and documented. The process of soliciting and managing grant projects was defined, documented and the responsibilities assigned to members of the executive committee, including the newly elected Treasurer. With the successful implementation of that objective, the more core mission of "Inform and Promote the Byway" moved from #2 to #1 on the prioritized list of objectives to accomplish the following year.

"Looking at the matrix from one year to the next gives us a real sense of accomplishment," Hamilton says. "This has been a very worthwhile process to go through. It has been enlightening, and I would highly recommend the process to any other organization. Specifically, I would recommend Ray Patterson and Capital Consulting Group."

Since the future is as close as tomorrow, smart companies and organizations need no longer struggle with developing strategic plans to guide them towards that horizon. The expertise of Ray Patterson and Capital Consulting Group combined with the power of revolutionary AMCat computer software yields an end result of focused organizational energy that takes groups from where they are to where they want to be – seemingly at warp speed.

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