

Strategy Sort Workshop

What This is a technique for examining and applying a multi-level strategy to a group of prioritized goals in strategic planning. It helps leaders understand not only how their goals fit into this multi-level strategy approach but also understand the requirements of, how to free up, and assign appropriate levels of resources to support the goals.

When This technique is used in Strategic Planning after all potential goals are created, assessed and scored.

- How**
- Create the Matrix:** Create and label a seven box matrix as illustrated below. Add the scored, prioritized, potential, goals to the left column.
 - Review Strategy Elements:** Review and discuss the mix of activities that constitute strategy by using the labels for the matrix, and the options for each listed below each column.
 - Move Goals to “Do” Column:** Individually discuss the goals and determine where it should be placed on the matrix under the What We Will Do column. Ask: What section does this belong in? Move the goals in the yellow box individually to the appropriate section of the “What We Will Do” column.
 - Address Trade Offs:** Once a goal is placed it is important to discuss where the resources to support the goal will come from. This is important because failure usually results from not assigning an appropriate level of resources to accomplish the goal. Discuss the following: If we do this where will the resources come from? What will we stop doing to pay for this? Create “Quit Cards” to describe the activities that will be stopped and the resources that will be freed to be applied to the new initiatives.

	What We May Do:	What We Won't Do:	How to Resource:
Goals by Priority Scores	Strategic Choices: Business Changing Activities		
	Functional Strategies: Activities Related to Specific Functions		
	Operational Effectiveness Strategies: Process and Performance Improvement Initiatives		

New - ~~Modify~~ - ~~Continue~~
Stop - Maintain
Reassign - +Up - POM

that would warrant being raised to a higher level on the chart.