

Joel Barker's

Strategy Matrix®

Envision/explore/plan/implement

A strategic exploration tool
for finding the future faster

Strategymatrix.com



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What if...

You could dramatically reduce
uncertainty about the impact of
trends and innovations on your
future?



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What if...

- You had a process that:
 - Engages key stakeholders in fast, structured discussions
 - Allows targeted exploration of the future
 - Can be used at all levels
 - Creates clearer strategic communication pathways.
 - Easy to learn



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Strategic Exploration Tools

- What you do before you do your strategic planning
- Several tools for exploring
- The Strategy Matrix® is one of four



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Three Essential Explorations

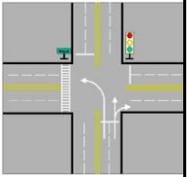
- What are the possible long term implications of what we are considering?—*divergent*
- What are the potential impacts of external elements on the direction our organization is planning to take?—*convergent*
- What is happening in the broader world that we should be paying attention to?



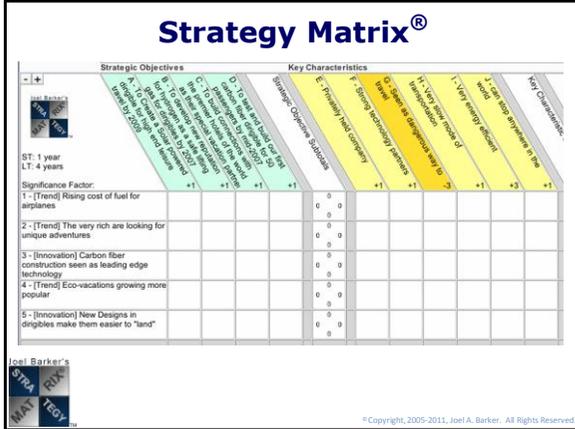
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The Strategy Matrix® Strategic Exploration Tool

- Dialogue at the Intersections, a convergent conversation
 - How might internal and external events impact on your strategic direction
 - How might a change in your plans alter the essence of your organization

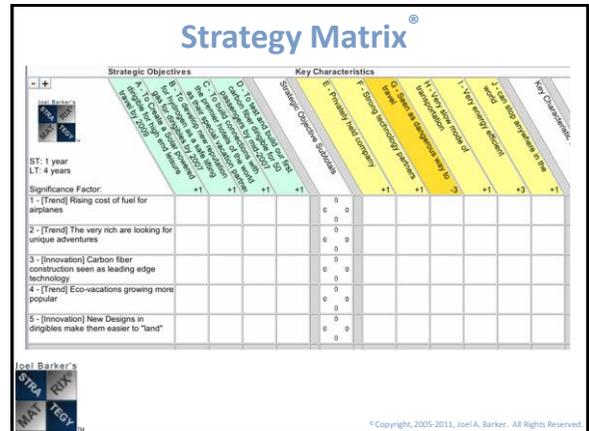



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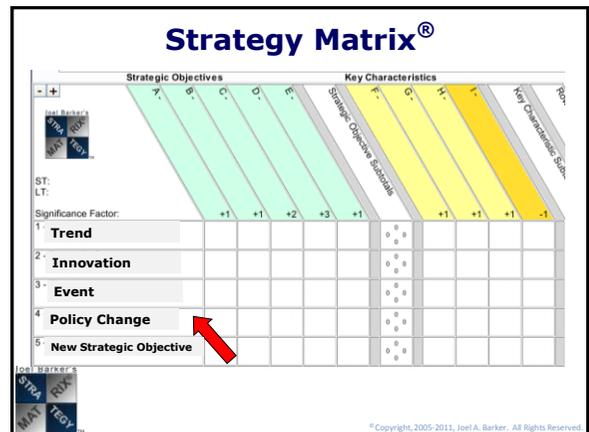


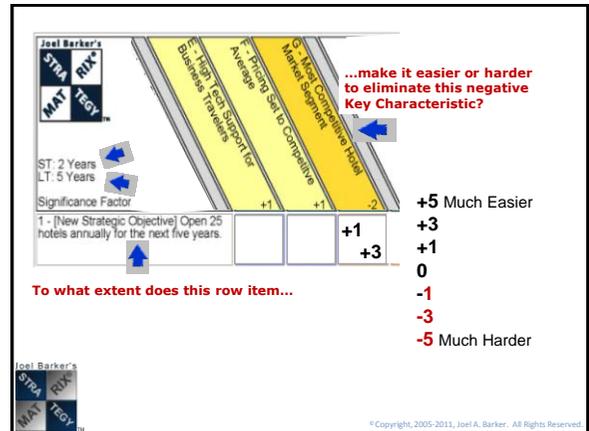
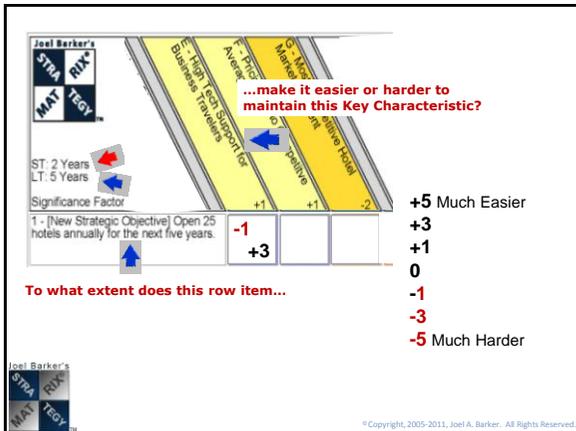
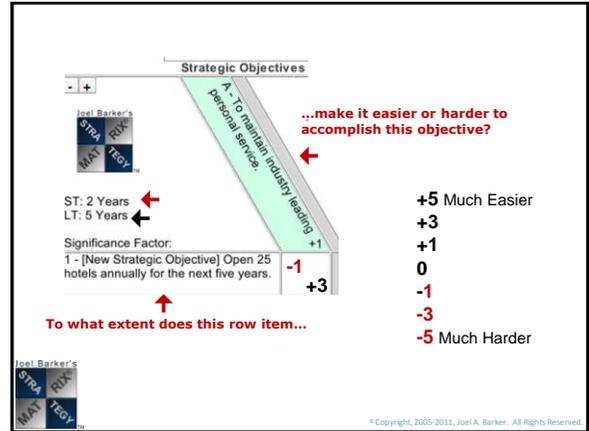
- ### Based on
- **Strategic Objectives**
 - Where you want to be that you aren't yet
 - 2 -5 years out
 - Quantified and dated
 - **Key Characteristics**
 - Attributes of an organization that are essential to defining its personality or character
 - May include positives and negatives
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- ### Key Characteristics
- Organizations have many attributes or characteristics but only certain ones are key.
 - Johnson Wax: privately owned
 - Pillsbury Company: focus on food
 - Apple: Steve Jobs
 - US Army: Defense of America
 - Red Cross: Voluntary Members
 - **(Negative) – Rural Location**
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- ### Row Elements
- Emerging trends
 - Innovations
 - Policy changes—internal and external
 - Significant events—internal and external
 - Initiatives—internal and external
 - New strategic objectives
 - Anything that you think could have significant impact on your organization
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Preparing for the SM Exercise

- Identify 2-3 strategic objectives your organization has
- Identify 2-3 key characteristics of your organization

Simple Strategy Matrix

	SO	SO	KC	KC	
Trend					
Innovation					
Strategic Objectives					

Strategy Matrix

Trend	/	/	/	/	+
Innovation	/	/	/	/	+
Strategic Objective	/	/	/	/	+

For Internet training on the SM software, call Richard Gaynor at Star Thrower: 651-209-1075
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The Three Questions:

- To what extent does your row item make it easier or harder to achieve your strategic objectives?
- To what extent does your row item make it easier or harder to maintain your key characteristics?
- To what extent does your row item make it easier or harder to eliminate your negative KC

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Debriefing the Exercise

- How is this conversation different than your “usual” conversation about the future?
- What is the value of having an “outsider” work with you thru the questions?
- What is the value of the information collected?

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Ways to Use

- How might you use this tool in your church?
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-
-
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Strategy Matrix® Applications

- Keeps track of environmental forces
- Assigning departmental goals
- Assists in assigning managers to initiatives
- Compares perceived impact of specific changes on various departments
- Rank orders impact of new organizational changes on various departments
- Structures quarterly strategic discussion in an efficient way

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Strategy Matrix® Applications

- Prioritizes alternative choices in marketing, product development, organizational direction
- Compares perceived impact of action of one department on other departments
- Measures influencers against SO's and KC's at all levels
- Survey various divisions and departments for their opinion of the impact on their SO's and KC's of a new organizational strategy

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Applications

- New policy testing with different groups doing the same row item
- A potential merger with another church
- Prioritizing projects
- Ongoing monitoring of external forces



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Strategy Matrix Results

- Clearer understanding the potential impact of row items on your future
- Engagement of key stakeholders in exploring and evaluating key strategic information
- Ongoing process to keeping connected to changes and how they may alter the direction of your organization



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Strategy Matrix® Stories

- IBM PC project
- Johnson Wax
- Prior Lake
- Optimist International
- Iowa Lutheran Churches
- Career explorations by students



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Board engagement: Scoring Rows

- Board members can score rows in preparation for meetings
- Board members can read rows already scored by smaller group
- Different teams can score the same rows to compare perspectives.



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Big Results from Using the Strategy Matrix®

You have a fast, inclusive process that allows you to easily engage key people in thinking about your organization's future.



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Big Results from Using the Strategy Matrix®

You have a simple structure for improving internal communications about the future up and down your organization.



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Big Results from Using the Strategy Matrix'

You can monitor the external forces that could shape your future more efficiently and effectively.



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Final Thought

- The 21st century challenge:

We have to become much smarter at anticipating both the short- and long-term impacts of factors on our future.



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