

# EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. I)

STEP 1: ESTABLISH STRATEGIC CONTEXT		
TASK 1: Gather Financial Data	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	
TASK 2: Compile Employee Survey Results	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	
TASK 3: Capture Key Initiative and Goal Updates	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	
TASK 4: Revisit Mission and Values	Who will join you in this meeting?	
	When will you meet?	
	Who will be responsible for preparing the final document?	
	By when will the document be complete?	
TASK 5: Capture Current Reality	To whom will you delegate?	
	When will you assign them this task?	
	What information will you include?	
	By when should the task be completed?	

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SAMPLE

STEP 1: ESTABLISH STRATEGIC CONTEXT		
TASK 1: Gather Financial Data	To whom will you delegate?	Marcus (CFO)
	When will you assign them this task?	3/1
	What information will you include?	The financials sheet on page 51.
	By when should the task be completed?	4/1
TASK 2: Compile Employee Survey Results	To whom will you delegate?	Leah (COO)
	When will you assign them this task?	3/1
	What information will you include?	The survey questions on page 53.
	By when should the task be completed?	4/1
TASK 3: Capture Key Initiative and Goal Updates	To whom will you delegate?	The executive team—divided by goal
	When will you assign them this task?	3/1
	What information will you include?	The Goal Status form on page 57.
	By when should the task be completed?	4/1
TASK 4: Revisit Mission and Values	Who will join you in this meeting?	The executive team
	When will you meet?	3/25
	Who will be responsible for preparing the final document?	Liam (EA)
	By when will the document be complete?	4/1
TASK 5: Capture Current Reality	To whom will you delegate?	The executive team—divided by products/ stakeholders
	When will you assign them this task?	3/1
	What information will you include?	The current reality form on page 71.
	By when should the task be completed?	4/1