



StratPro: Where Strategy Meets Productivity

A WHITEPAPER AND PANEL DISCUSSION FROM THE ALTERNATIVE BOARD

StratPro is a powerful strategic planning program that helps business leaders create compelling visions for their businesses, align their entire teams around a thriving and engaged culture, and successfully execute their strategic plan. StratPro is an essential tool in the transformation of your entire organization into one that works toward a common vision and set of goals. StratPro works in tandem with TAB's Business Builder's Blueprint and is a foundational tool in the TAB arsenal.

Every business needs to know where it wants to go. And to get there they need their entire team facing in the right direction, possessing the right skills, and delivering the right results at the right time. Simple in theory. Usually much more challenging in reality.

StratPro by TAB gets to the heart of the strategy and productivity issues that prevent a business from performing at its maximum potential. The process consists of a series of facilitated workshops to establish the right strategic direction for your company, and to align your team to achieve your vision.

You and your leadership team will develop the right strategic plan for your business and implement that plan with accountability processes that ensure successful completion.

StratPro's strategic business transformation process can free you from the day-to-day tasks of running your business, so you can focus your time on the strategic direction of your company and the high impact activities that lead to the greatest results.

StratPro utilizes TAB's Business Builder's Blueprint, the industry-leading platform for running private businesses strategically. By participating in this process, you can expect to grow your business, earn more profits, increase the value of the business, and achieve greater work-life balance as a business leader.

Meet the Panelists



JOHN HENSON | PRESIDENT & CEO | WELLBORN HENSON INC.

Industry: Construction

Services: Commercial Millwork

Location: Atlanta, GA

StratPro Team Size: 10

Quote: "StratPro is really where the road meets the road. It's about doing the work, fleshing out the details, and engaging the entire organization."



MICHAEL ROTH | OWNER | CRS CONTROL & ROBOT SERVICE

Industry: Automation and Industrial Robotics

Services: Technology, Robotics, and Automation Solutions

Location: Vienna, Austria

StratPro Team Size: 8

Quote: "In the past everybody was doing something but nothing was defined. Now we have defined roles and tasks for each person."



LINDSEY CARNETT | CEO & PRESIDENT | MARKETING MAVEN

Industry: Marketing

Services: Full-Service Marketing & Communications

Location: New York and Los Angeles

StratPro Team Size: 12

Quote: "Everyone is willing to step up and take on bigger workloads because they know the impact it will have on the company and their careers."



KERRY HILL | OWNER & MANAGING DIRECTOR | TINDER ENGINEERING

Industry: Engineering

Services: Design and Manufacturing Engineering

Location: South Island, New Zealand

StratPro Team Size: 9

Quote: "A small phrase that we use is: Together We Achieve More. Sharing and combining the knowledge. It's very powerful."



"Do you have a good plan but aren't really sure how to go about getting it implemented? Most strategic planning fails due to poor execution. StratPro includes both forward-thinking strategic planning and accountability-driven implementation."

JASON ZICKERMAN

President & CEO, The Alternative Board Worldwide

Let's talk about engagement. Why was StratPro the right thing at the right time?

KERRY: I had been running my business for a lot of years. We wanted to keep growing, so I knew I needed a grand plan and some direction. StratPro suited how we operate. I knew it could take us forward and I guess point us to where we were going and get everybody going in the same direction.

MICHAEL: While we were already a successful company, we perhaps lacked clear structure in our organization. And at the time we really didn't know how much we needed that structure. We were earning very good money, but then during the COVID crisis it became apparent that while everyone was doing something, there were no really clear roles or defined positions within the company. So we figured out, okay, we need to change something. So my partner initiated the StratPro process.

LINDSEY: My experience is very different. I am really familiar with problem solving and having an external board, so when TAB had reached out I said, "I think I already have this going." Then they explained the concept of this online world that existed with a very organized process. And for me that was something that these other organizations didn't offer. I am an idea person that thinks big picture. I have very interesting concepts, so I really wanted to articulate and share those with the team. StratPro helped to get my vision into a very clear place for everyone to access.

JOHN: I started as a TAB member in 2019. I just really enjoy it. From the beginning I thought it was very inspirational. I was getting all this value out of being a TAB member, but then was going back to work and continuing to engage in chaos, just ruling by fiat and flying by the seat of our pants. So I knew I needed some structure.



What have been the most significant changes in your business since starting StratPro?

JOHN: I think that the biggest impact has been the engagement of our team. It was amazing to see how engaged they were and are. That's the biggest thing. Now I know that they're engaged and actually interested and all that other good stuff.

LINDSEY: For my team I think the most significant change has been the visibility into our strategies. What are the KPIs? What are our strategic goals? It's about them not just being a cog in the wheel or me being a taskmaster. It's about figuring out how a specific task is going to back the overall objectives of the company or where we want to be collectively. The process of doing the survey and the evaluation on the company was a really great thing in terms of my team feeling important and having access and having a say-so in parts of the company they didn't even know I was paying attention to.



"For over 30 years, TAB has been working with private business owners, helping them run their businesses more strategically and achieve their personal vision of success. StratPro allows us to apply this same value to the leadership team. It provides a platform and structure for all employees to be more engaged in the business."

JASON ZICKERMAN

President & CEO, The Alternative Board Worldwide

KERRY: For me it has been aligning my senior leadership team and department managers. My business partner and I started StratPro with just the two of us, then I was like, we need to have everybody in on this. We set out to have everyone looking further ahead and wider than just their own department and their own direct reports. We've still got some work to do, but we are definitely holding each other accountable more and that is what we want to be hitting. It is really about accountability and responsibility. That is probably the biggest change. We are working together.

MICHAEL: It was very interesting from the very beginning. Just in the first two workshops, we as the owners recognized that in the past we had completely lost our mission and the sense behind what we were doing. StratPro is helping us find that mission again. We have formed teams, positions, and roles. It is really important to have clear communication and regular meetings. We are just starting the regular larger group meetings but within the management team it already works. Now we are at the point where we are forming our KPIs for the company. We recognize that setting KPIs is really-really important for running a company. Not just doing everything based on feelings.

What would your employees say? Do they sense something different since starting StratPro?



LINDSEY: I started out doing these workshops with just our management team and then we added the entire staff. So we spend part of our time with our management team, then break, then bring in the whole staff. So there is a bridge between what our management team discusses and then what our full staff discusses. Everybody sees the big united goal and they actually step up to the plate and volunteer themselves to take on more roles. They say "I will manage the employee education" or "I'll manage the weekly meetings." Everyone is willing to step up and take on bigger workloads because they know the impact it is going to have on the company and their careers. They're getting to be a leader and a hero among their peers. It's been great.

KERRY: Our critical success factor was developing our whole staff to meet a certain level of how they operate, how they integrate in the business. We've been doing a lot of work on accountability and getting people to step up. I think they are seeing a change there in people being held to account. A lot of our staff has said that there is something different. They have a lot of friends in business who don't know what their policies are. We've had some really positive feedback in some really uncertain times. That's got a lot to do with StratPro and just understanding what my role is. Even when I don't really know what is going on like during the pandemic, to get some plan out, get it agreed on, and make it happen.

MICHAEL: In the past everybody was doing something but nothing was defined. Now we are continuously working on it so that we have defined roles and tasks for each person. For an example, an assistant contacted our CEO and said "Okay I want to have a workshop together to define our interface between our work and who is responsible for what." I am pleased they recognize changes in the structure. Nobody wants or cares what you've had in the past. We now have a proactive process where employees ask for defined tasks and rules.

JOHN: I think my employees would say they have noticed and are noticing the structure. Right now in StratPro, we are working on our Standard Operation Procedures (SOPs). Then as we get those documented, we will figure out the Key Performance Indicators (KPIs) throughout each department and the entire organization. Since we started StratPro, we have made changes to various positions. We are all seeing a more structured workplace. Employees are seeing us all follow the structure. It's not just a good idea today that doesn't get followed up on tomorrow. So we are laying in those SOPs and KPIs and we're following them. So I really think the biggest thing employees are noticing is that structure.

How about you in your role as business leader? What has changed because of StratPro?

MICHAEL: If there is just one key word, it is communication. In the past we as the business leaders were not communicating about the status of the company or if there were some troubles with a customer. For me personally, I changed a lot since starting StratPro. I worked with my coach on my personal deficits. It's been a process of almost 16 months. I've taken steps to reduce my deficits in some areas. But again, in the end, it is communication. It is one of the most important things in a company. Truly.

KERRY: StratPro has certainly helped me answer some medium-term questions – and I still have some longer-term questions to work on. But what StratPro has really enabled me to do is answer a lot of those questions without having to overthink them. The whole process of figuring out where I am, what stresses me, what doesn't stress me, and how the entire staff interacts together. So for me that's been pretty good. I would say that people probably notice that I am more confident now when speaking with other staff or larger groups. On a personal level, StratPro has reduced stress and personal anxiety, mostly around decision-making and trying to answer some of those tough questions that aren't always easy to come up with a good solution to.

JOHN: I wanted the ability to step away from the business. I am retiring; I just wanted the ability to step away when I want. So I was already working on blocking out SOPs. I would just write down an SOP when there was a problem. But it was not a wholistic effort. Then we started working with StratPro. And somebody else on my team was assigned SOPs, then three more people. I've now transitioned those key people into management positions to effectively run the company while I'm away and so I can also just work on business development. That's huge. I don't even worry about how that stuff gets made out there now. That's somebody else's job. I know what needs to happen, but I don't need to be the one doing it.

LINDSEY: I just went to Hawaii to celebrate my husband's birthday, I brought my laptop with me and I didn't open it for the entire week! That was a lifechanging moment I think in my business career. StratPro has allowed me to step back and work on my business instead of inside my business. That was a really big moment for me. I feel heard and believe everyone now clearly understands the vision, objectives, roles and responsibilities, and knows where the ship is going. Staff now approach me and say, "I'm so excited about the year ahead!"





What expectations should be set at the beginning of a StratPro engagement with the business owner or strategic leadership team?

LINDSEY: We set a really clear agenda for our Operation Underdog StratPro workshops, which I love. Welcome and Warm Up. Summary & Overview. Create Strategic Business Goals. SMART Goals. Stress Test. Break. Develop Strategies. Develop Action Plans. Wrap Up. The agenda is clear so that everybody knows what's going to happen and there is total visibility. We've been conducting our StratPro workshops in a hybrid format so those people who are physically in our office are together in the conference room and those people who are remote can see everything and follow along completely. In terms of what the output is, it's super clear.

What would you say to someone who is hesitant to bring employees into these types of workshops?

KERRY: A small phrase that we use is: Together We Achieve More. I use the phrase often when people ask questions about why we use StratPro. For some business leaders, I think the thought of involving a larger group and sharing knowledge is probably a little uncomfortable. But there is a huge benefit to sharing and combining knowledge. It's very powerful.

JOHN: I would say do it anyway! Jump in. Get over that fear. Your team is having those thoughts and desires for these discussions, whether you are aware of it or not. So involve. Engage. Distribute. Divest. Push it down the organization. And get the hell out of the way.

LINDSEY: Our mantra is "If you are comfortable you are not growing!" These StratPro discussions are meant to be difficult conversations that challenge and stretch people.

What about employee retention?

LINDSEY: I think StratPro has definitely helped us with employee retention. With such a war on talent and the great resignation, getting as many people in your organization as involved as possible is a really great way to enhance employee retention. In a lot of ways, StratPro is like executive leadership development for your employees and is actually a benefit that you can tie into some job offers. Your team learns how to look at and assess the business in all these different categories, then they help create these statements and strategic planning and so many other big pieces. I explained to my people that StratPro is also my investment in them to develop their leadership skills and executive thought processes. Nobody is just going through the motions and there has been a lot of innovation that comes from it.



What would you say to a colleague or TAB board member about StratPro?

MICHAEL: If someone is considering StratPro and is just not sure, I would suggest they maybe ask each employee to explain to them the mission and the model of their company. If the employee knows the answer, you maybe don't need to build a new structure or start with StratPro. But even if you believe you have clarity, I think you will realize that not everything is so clear in your mission or strategy as you thought it might be. StratPro is an enrichment for everyone on the team, working together on the company. It is not just about the owner, it's about everybody working together.

KERRY: When somebody asks about cost, I think it is important to focus the conversation more on the value. In business you spend your money on all sorts of things. Business leaders need to look at StratPro as an investment, not a cost. Then break down the investment in all the different areas of the business and consider the multipliers that are going to come out of it.

LINDSEY: Going back to employee acquisition and retention for a moment, I think StratPro is actually a benefit that you can tie into some job offers. In so many ways StratPro is like executive training on how to look at and assess the business in all these different categories. Creating mission statements and strategic planning and all these big pieces. I tell my team "This is my investment in you developing leadership skills and executive thought processes." Great ideas and a lot of innovation are coming out of our StratPro workshops too. I would tell business owners that maybe your next big idea will come out of these StratPro meetings. And how much is that worth?



When did you know StratPro was the right decision and how will you gauge your success from it?

KERRY: I think it is when I noticed the willingness of three of the younger members on our senior leadership team to really step up and grasp the StratPro concept. They also expressed that they are very much willing to step up even more. Like sponges, they want to understand more about the business and how it operates. Which is great. We now have asked each of those three people if they would be interested in a financial stake in the business. All three said yes. It was through StratPro - that process and involvement and how they reacted to it and conducted themselves - that gave us the confidence to ask the question.

LINDSEY: Success is the easiest thing to gauge from StratPro because the goals are so clearly defined. You know when you hit that goal, you know when you missed it. You know where you came up short and what we need to improve. With StratPro, it is like a living breathing document that everybody is held accountable on. At first I thought it was a one and done deal, but executing your plan takes accountability and the ability to retool things along the way. Adaptability.

MICHAEL: Our StratPro success was clear when I saw that there were responsibilities for each person on the team, and everybody on the team took responsibility for different parts of the implementation. It is the structure that we needed. Each person is responsible for something and has to focus on it, which is well-defined during the process.

JOHN: We must have had 10 or 12 staff members in the room when we were doing our vision and strategic workshop. Everybody was incredibly engaged and we were getting all this input and feedback. I just looked around the room and was like "Wow. This is way cool." That's when I knew I made the right decision with StratPro.



We Wrote the Book on Strategic Business Transformation

Written by Wall Street Journal bestselling author Allen Fishman. StratPro describes the step-by-step process for implementing the StratPro program in your business and how it achieves results.