

Redwood Advisors offers customized workshop projects created from 12 distinct modules

Core strategic modules

Value-adding strategic modules

Organizational modules

Area:

Strategy: Maximizing Growth

Benefits:

Develop best-in-class strategy assets to maximize profitable growth and focus your leadership, staff, investments, and tech on your most important opportunities

Modules:

- Actionable Strategic Overview
- Strategic KPIs and Milestones
- Strategic Resourcing and Budgeting
- One Year Operating Plan
- Long-Term Future Visioning
- 6 Value Initiative Identification & Prioritization
- Strategy to Action
- 8 Adjacency Identification
- Strategic Risk Identification and Assessment
- 10 Fundraising Support

Organization: Organizational Excellence

Develop best-in-class organizational assets to define success, develop your culture, and increase employee engagement and productivity

- n Purpose, Mission, and Vision
- 12 Values and Practices

Each customized workshop project includes 1 or more modules based on which ones best fit your needs

Based on your company's needs, we can create a customized, high-value workshop project

Core strategic modules Value-adding strategic modules Organizational modules

Modules		Benefit overview	34
- <u>Ö</u> -	Actionable Strategic Overview	Develop a best-in-class actionable strategic overview including a well-defined winning aspiration, target market, and plan to win	Most companies start with this module and add others
	Strategic KPIs and Milestones	Identify top KPIs and milestones for your most important goals or initiatives to track and drive performance on what matters most	others
0	Strategic Resourcing and Budgeting	Identify the most important people, processes, tools, and technologies needed for your top initiatives and goals	l
Q	One Year Operating Plan	Develop and align on objectives for the following year and generate an actionable strategic plan that articulates top KPIs, actions, and resource needs	
A	Long-Term Future Visioning	Develop a compelling, ambitious and measurable BHAG (Big Hairy Audacious Goal) and vivid descriptio of your company's future	n
Î	Value Initiative Identification & Prioritization	Identify and prioritize the top sources of value creation with a robust approach that considers both value ability to execute	&
: }•	Strategy to Action	Establish clear accountability and action items to ensure alignment and an established path forward to achieve key initiatives or objectives of your organization	
	Adjacency Identification	Identify and prioritize top adjacencies your business can serve or enter with a thoughtful approach that considers value & feasibility	
A	Strategic Risk Identification and Assessment	Identify and assess the top risks to your business and actions your company can take to mitigate them	
	Fundraising Support	Articulate fundraising goals for your organization and develop a high-level pitch to raise those funds	
©	Purpose, Mission, and Vision	Define clear purpose, mission and vision statements to help define your organization's strategy and cultu	re
*	Values and Practices	Deploy a best-practice approach to identifying your organization's top values and how to embed them through day-to-day practices	

Workshop module overviews: Maximizing Growth (1/5)

Module



Value for your business

- Develop a best-in-class actionable strategic overview including a welldefined winning aspiration, target market, and plan to win
- Better focus your company's key resources (e.g., staff, investments, executive time) towards prioritized, actionable goals

Process overview

- ~3-5 interviews with select stakeholders on strategic overview and key markets
- Prepare draft materials for workshops; ~3-5 conversations to refine
- 1 workshop to refine and finalize winning aspiration and strategic overview
- 1 workshop to create threephase overview or Flywheel
- · Refine and finalize materials

Key outputs

- Strategic overview that articulates your winning aspiration, target markets, and plan to win
- A three-phase overview or Flywheel showing how you organization can win and develop a strong, sustainable business



- Gain alignment on your company's strategic goals and metrics, based on your company's key value drivers
- Identify and prioritize the critical KPIs and milestones to effectively track performance over time
- ~3-5 interviews with select stakeholders to identify top metrics and goals
- Survey executives to prioritize / refine potential metrics and goals
- Prepare draft materials for workshops
- Workshop to select and build out top metrics and goals
- Refine and finalize materials

- Dashboard for each key initiative or goal outlining:
 - Top KPIs including target values and perf. tracking
 - Top milestones including owner of milestone and target date of completion

`ADVISORS

Workshop module overviews: Maximizing Growth (2/5)

Module



Note: This workshop best done after "Value *Initiative Identification* and Prioritization"

Value for your business

- Identify the most needed resources for your company's most important priorities / initiatives
- Develop a high-level plan for procuring resources
- Budget based on expected costs for the short- and long-term resource needs

Process overview

- ~3-5 interviews with select stakeholders to develop draft view of resourcing and budgeting
- Prepare draft workshop materials; ~3-5 conversations to refine
- Hold 2 workshops to develop and refine materials
- Refine and finalize materials

Key outputs

- · Resourcing plan for high- and mediumpriority initiatives (3-5 most critical people, processes, and tools)
- Identification of cost. owner and target date of resource procurement
- List of ~3-5 key next steps for each initiative pertaining to resources



- · Clear, actionable, and aligned strategy to guide actions and decisions in the following year
- Effective dashboard to drive progress and results on key objectives
- Targeted engagement (e.g., surveys, interviews) to define top obj. and results
- Prepare workshop materials
- Workshop to refine and prioritize on top objs. and results
- Develop and refine KPIs, actions and resource needs per objective

- Clarified list of top objectives and results for organization
- List of top KPIs, actions and resource needs for each objective along with an owner for each
- One-page dashboard

Workshop module overviews: Maximizing Growth (3/5)

Module



Value for your business

- Identify a compelling, ambitious and measurable BHAG (i.e., long-term vision) for your company
- Align, motivate, and engage your entire organization around one challenge and inspiring vision of success

Process overview

- ~3-5 interviews and a survey to identify long-term goals of leadership team
- Prepare workshop materials
- Hold workshops to identify and articulate BHAG and vivid description
- · Refine and finalize materials

Key outputs

- Articulation of company's "Big Hairy Audacious Goal" (e.g., ~25-year goal)
- A vivid narrative description of what the future could look like once your company achieves the BHAG



Note: This workshop must be completed in conjunction with "Strategic Overview and Aspiration"

- Identify the key potential sources of value specific for your business (initiatives)
- Identify top 3-5 initiatives to help focus resources and attention on what matters most
- Opportunity to think strategically about where value for your company is currently being missed

- ~3-5 interviews with select stakeholders
- Survey executives to draft list of possible initiatives
- Prepare draft materials for workshops; ~3-5 conversations to refine
- Hold 2 workshops to develop and refine materials
- · Refine and finalize materials

- List of value initiatives (~12-20)
- Prioritization matrix of ~12-20 initiatives
- Identification of 3-5 toppriority initiatives

Workshop module overviews: Maximizing Growth (4/5)

Module



Value for your business

- Establish clear accountability and action owners to ensure alignment among organization
- Identify and prioritize top action items to accomplish key company objectives or goals

Process overview

- ~3-5 interviews with select stakeholders
- Survey executives to draft list of possible owners and actions
- Prepare draft materials for workshops; ~3-5 conversations to refine
- Hold 1 workshop to develop and refine materials
- Refine and finalize materials

Key outputs

- Completed model laying out Responsible, Accountable, Consulted and Supporting roles for top objectives / initiatives
- Prioritized list of action items and owners for each objective / initiative



- Thought partner in identifying top adjacency opportunities for your organization
- Clear understanding of where to prioritize efforts going forward
- Opportunity to think strategically about where value is currently being missed within your company

- ~3-5 interviews to identify possible adjacencies (both "emerging" and "new")
- Survey to identify additional possible adjacencies
- Additional survey to start prioritizing adjacencies
- Prepare workshop materials
- Workshop to prioritize adjacencies and identify top actions for top adjacencies
- Refine and finalize materials

- List of possible adjacencies (~5-15)
- Prioritization matrix of adjacencies
- Top 3-5 adjacencies
- Top 1-3 actions for each top adjacency

Workshop module overviews: Maximizing Growth (5/5)

Module



Value for your business

- Opportunity to identify and address potential risks before they actualize
- Clear understanding of how to mitigate your top risks and what steps your organization needs to take

Process overview

- ~3-5 interviews to identify draft list of strategic risks and to start assessment
- Survey leadership team to build out list of risks and start assessment on top risks
- Prepare draft materials for workshops
- Workshop to finalize top risks, assessment and mitigation tactics
- Refine and finalize materials

Key outputs

- Top ~5-8 key strategic risks
 - Assessment of each strategic risk on 3 dimensions (severity, velocity, probability)
- 3-5 mitigation tactics for top 3 risks



- Articulate fundraising goals for your organization and discuss best path forward to raising those funds
- Identification of potential investors to achieve fundraising goals
- ~3-5 interviews to articulate fundraising goals
- Survey to identify potential investors
- · Prepare workshop materials
- Workshop to identify top investors
- Refine and finalize materials

- List of possible investors (~10-20)
- List of clearly defined fundraising goals
- List of clearly defined next steps for fundraising, including owner and timeline

`ADVISORS

Workshop module overviews: Organizational Excellence

Module



Value for your business

- Opportunity to bring the organization together around an agreed-upon purpose, mission and vision
- Clarify parameters and requests for mission and vision statement
- Clearer and crisper mission and vision to articulate a clear strategy aligned with your company's culture

Process overview

- Review any pre-existing purpose, mission and vision statements
- ~3-5 interviews to begin refining thinking
- Survey to collect team thinking
- Prepare draft materials for workshops
- Workshop to finalize purpose, mission and vision
- Refine and finalize materials

Key outputs

- Clear, motivating, agreed-to purpose and mission
- Forward-looking company vision statement



- Identify 3-5 core values to help your organization perform and act consistently over time
- Identify a few, crosscutting practices to help bring your values into practice so your organization can grow and sustain its culture
- Review any pre-existing materials related to core values and practices
- Survey team to identify draft list of core values
- ~1-3 conversations to review results so far
- Prepare workshop materials
- Workshop to select and define
 ~3-5 core values
- Workshop to articulate ~1-2 practices to support each value
- Refine and finalize materials

- Top 3-5 core values
- Description of each core value
- 1-2 concrete practices to demonstrate what that value looks like in practice
- High-level plan to distribute and use key materials with staff etc.



