

How to pick the right consultant for your strategic plan

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COMB - COGA

MNP

Introduction

- ▶ Multiple strategic planning processes available
- ▶ Different levels of value, complexity
- ▶ Lots of tools and resources
- ▶ Contract details will require careful look and approval

But what ultimate question(s) are they trying to answer for you?

Agenda

Worksheet - please fill in as you go

- ▶ What questions do you need to answer first as boards, committees?
- ▶ Then what questions should you ask to determine the right consultant

How strategic do you (really) want to plan?

- ▶ Visionary planning
- ▶ Strategic planning
- ▶ Operational planning

Major implications for how we plan, think and execute

How strategic do you (really) want to plan?

- ▶ Visionary planning
 - ▶ Things beyond our control, e.g. Amazon factor
 - ▶ Discontinuities, e.g. global food trends
 - ▶ Weak signals, strong signals
 - ▶ Over-the-horizon thinking
 - ▶ Develop assumptions, so that you can make plans
 - ▶ *In summary: Clear Direction*
- ▶ Strategic planning
- ▶ Operational planning

How strategic do you (really) want to plan?

- ▶ Visionary planning
- ▶ Strategic planning
 - ▶ Built on key assumptions about the future
 - ▶ Connects execution dots
 - ▶ Builds out a roadmap
 - ▶ May span across multiple years, and even board terms
 - ▶ What is important, but also, what is not important
 - ▶ *In summary: Clear Priorities, tied to Clear Direction*
- ▶ Operational planning

How strategic do you (really) want to plan?

- ▶ Visionary planning
- ▶ Strategic planning
- ▶ Operational planning
 - ▶ Execution focused on tasks
 - ▶ Things you can start, and finish, this year or quarter
 - ▶ Smaller moving parts of bigger priorities
 - ▶ *In summary: Clear Focus, tied to Clear Priorities, tied to Clear Direction*

What is your primary focus?

- ▶ Industry level - global, federal or provincial
- ▶ Board effectiveness
- ▶ Clear priorities for staff and committees - “We just want clear priorities!”
- ▶ Mandate clarification - what is not written in the legislation
- ▶ Communication plan - internally/externally
- ▶ Strengthen own relevance with members?

Who should be involved from your side?

- ▶ Board driven, or staff driven, or combination
- ▶ Small committee, or full board
- ▶ Staff involvement - great communication bridge
- ▶ Stakeholder involvement:
 - ▶ Farmers and growers
 - ▶ Members
 - ▶ Non-producer involvement, e.g. retailers, distributors, bloggers
 - ▶ Government - federal, provincial, or even local
 - ▶ Organisations - both inside and outside agriculture

What do you need from your consultant?

- ▶ Environmental scan
- ▶ Focus groups
- ▶ Regulars: SWOT analysis, vision and mission statements
- ▶ Surveys of industry and members
- ▶ National level tie-in
- ▶ Vision, or Strategy, or Priorities, or Focus-level Plans
- ▶ Understanding of staff/board time commitment
- ▶ Reports
- ▶ Data privacy

What happens after the consulting work?

- ▶ Access required to the consultant?
- ▶ How does strategy turn into action?
- ▶ What reporting and agenda changes are required?
- ▶ How much of this work can or should then remain in-house?
 - ▶ *Learning Organisation, or Doing Organisation*
- ▶ How does this change your own planning going forward?

In conclusion

- ▶ As representatives of industries, it is up to you as boards, leaders
 - ▶ No one else is as responsible to get this right
- ▶ First decide your real level of ‘strategic’ planning
- ▶ Then get clear on your “Why?” for strategic planning
 - ▶ Outcomes you want
 - ▶ Level and type of clarity you need
- ▶ And then select the right consultant

Worksheet will help you do that

Questions?

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