



Katahdin Group

"I have done strategic planning with huge budgets and large firms and done it with small budgets, but in all my years of doing this, I have never gotten a deliverable as strong as I got with Katahdin Group's Strategic Ascent program."

FRANK WEISHAUP, CEO, OWL LABS

"There's a lot of attention to the governance surrounding execution of the strategy and the process that you're going to undertake throughout the year. And that's the real differentiator."

MELISSA GORDON, PRESIDENT & CEO, MGX BEVERAGE GROUP

PROVEN STRATEGIC PLANNING TO ALIGN YOUR C-SUITE AND MOVE YOUR STRATEGY FORWARD

Developing and executing a solid annual strategy is essential to the growth of your business... and it is no easy task. Effective strategic planning requires clear direction from the CEO combined with input from the leadership team to get alignment behind the plan. And even when a solid plan is developed, over time, teams often lose focus on execution when more immediate operational challenges or opportunities arise.

Our process brings together input from the CEO and leadership team to develop a plan they can align around and execute against as the year progresses.

THE STRATEGIC ASCENT PROGRAM HAS THE PROVEN PROCESS AND TOOLS TO HELP CEOS TO:

- ▶ Set the right strategic direction and plan
- ▶ Drive team motivation and alignment needed to agree and execute on the plan
- ▶ Elevate the team's strategic acumen and executive functioning
- ▶ Have a system and processes in place to drive accountability and follow through on the plan

HERE ARE SOME OF THE FACTORS THAT MAKE THE STRATEGIC ASCENT PROGRAM UNIQUE AND HIGHLY EFFECTIVE:

- ▶ Proven high-impact methodology and toolkit built over two decades in collaboration with our CEO clients
- ▶ Seasoned facilitators with insight and experience to drive your team to the right strategic plan— all are former C-level executives
- ▶ A unique focus on strategy and the leadership team effectiveness required to execute
- ▶ Highly effective working sessions that produce clear, actionable, agreed-upon deliverables, with a commitment to measurable results

- ▶ Compiled and analyzed leadership team pre-work to drive strategy session efficiency
- ▶ Flexible, ongoing coaching support and tools to ensure execution of the plan

Successful strategic planning and alignment starts long before the offsite. It's our belief that by the time all members of the leadership team arrive around the strategy table, much of the hardest work should be complete.

OUR PROVEN PROCESS FOLLOWS THESE SEVEN PHASES:

1. CEO Needs Assessment – Clarity of objectives and expectation setting
2. CEO Preparation – CEO Direction Deck collaboration
3. Leadership Team Preparation – Team interviews and pre-work
4. Program Design Review – Customized as needed, adapted to meet client needs and objectives
5. Development of Materials for Offsite – Customized application of Strategic Ascent Methodology
6. Delivery of High-Impact Offsite Sessions – Including post offsite participant satisfaction evaluation
7. Ongoing Cadence of Strategy Days – Driving alignment and execution of the plan

When we facilitate strategic planning with our clients we bring a powerful portfolio of trademarked “CEO tested, CEO approved” tools to the table to support the multi-level phases of the process. When the planning is complete, the team walks away with the tools they need to successfully execute on and be held accountable to the agreed upon strategy.

THE STRATEGIC ASCENT TOOLKIT INCLUDES:

- ▶ Structured leadership team prep documents
- ▶ CEO Direction Deck
- ▶ One-page Strategic Scorecard and metrics
- ▶ Action plans
- ▶ Ongoing strategy days supported by the scorecard and the Katahdin Case methodology

“Since we started using the Katahdin Group, our results have improved dramatically, and we are much better at strategy. The Katahdin process is really better than any other process that I’ve found.”

**CHUCK COHEN, MANAGING DIRECTOR,
BENCO DENTAL**

THE STRATEGIC ASCENT DELIVERABLES:

- ▶ Facilitated Deliverable
- ▶ CEO Point of View
- ▶ Leadership team input compiled and analyzed
- ▶ Prioritized SWOT
- ▶ Strategic Goals and related metrics and scorecard
- ▶ Leadership Governance and Organizational Alignment Plans
- ▶ Creation of Action Plans
- ▶ Case Prep and Strategy Day #1
- ▶ Case Prep and Strategy Days throughout the year

STRATEGIC ASCENT PRICING OPTIONS

Day	Focus	4-Day	8-Day
1	Collaboration Day	✓	✓
2	Alignment Day	✓	✓
3	Action Day	✓	✓
4	Strategy Day	✓	✓
5-8	Strategy Days		✓
		\$45,000	\$70,000



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TO START THE CONVERSATION:

Contact Erin Mullen, Managing Partner, at emullen@katahdingroup.com