Strategic Planning & Execution for Mid-Market Companies

STRATEGIC ASCENT

A disciplined strategic planning system to help CEOs and their leadership teams build a plan they believe in, and execute it with confidence.

THE PROBLEM

Most CEOs believe strategic planning is important. Fewer are confident in their process and plan.

7.8/10	6.9/10	5.7/10	5.5/10
Positive view of strategic planning	Enthusiasm to Participate	Effectiveness of current plan	Satisfaction with the process

Source: Golden Dome Associates, Strategic Ascent Program Growth Phase Survey

THREE TENSIONS THAT BREAK MOST STRATEGIES

Strategic plans don't fail randomly. They break in three predictable places.

1

Collaboration

The team shows up as spectators, not co-owners. What you get is compliance, not commitment.

2

Alignment

The team discusses but doesn't decide. Competing priorities stay unresolved and the planning goes on for months without progress.

3

Accountability

The offsite ends, operational noise returns, and six months in, the plan is a binder on a shelf.

"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 Weishaupt, CEO, Owl Labs

Katahdin Group

Strategic Ascent is not an offsite. It's a system.

Built over two decades with our CEO clients, Strategic Ascent is a disciplined planning system supported by three structural pillars. Each one is designed to resolve one of the three tensions.

PILLAR 1 - SOLVES COLLABORATION

Shared Ownership

Confidential one-on-one calls before the offsite. Direct collaboration with the CEO on a direction deck. Structured pre- work from each leadership team member. Your team walks into the room already invested, not arriving cold.

PILLAR 2 - SOLVES ALIGNMENT

Rigorous Process

Most leadership teams know how to debate. What they're often missing is a structured way to decide. Without that structure, agendas run over and tradeoffs get avoided. Strategic Ascent is built around a disciplined process that forces real decisions.

PILLAR 3 - SOLVES ACCOUNTABILITY

Execution Discipline

Regular strategy days set on the calendar before the offsite ends. Every goal has a clear leader and cross-functional team. An Internal Process Owner protects the cadence. Your plan gets the infrastructure it needs to live through the year.

"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

OUR PROVEN PROCESS FOLLOWS 7 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 Offsite Sessions:** Including post offsite participant satisfaction evaluation
7. **Ongoing Cadence of Strategy Days:** Driving alignment and execution of the plan

Every Strategic Ascent engagement is supported by a portfolio of trademarked tools, built and refined over 200+ implementations. When the planning is complete, the team walks away with everything they need to execute the strategy and be held accountable to it.

STRATEGIC ASCENT DELIVERABLES

- Facilitated Deliverable
- CEO Point of View
- Leadership team input compiled and analyzed
- Prioritized SWOT
- Strategic Goals, related metrics and scorecard
- Leadership Governance and Organizational Alignment Plans
- Creation of Action Plans
- Case Prep and Strategy Day #1
- Ongoing Case Prep and Strategy Days (for 8-day engagement)

STRATEGIC ASCENT PRICING OPTIONS

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

"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, CEO, Benco Dental

TO START THE CONVERSATION
Contact Erin Mullen, Managing Partner, at emullen@katahdingroup.com
or visit KatahdinGroup.com

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