



Strategic Planning with Thoughtexchange



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TURNING values into a concrete action plan is challenging. For smaller groups this requires a lot of meetings. And, as groups become larger, traditional engagement and communications tools become less and less effective at achieving the breadth and depth of information required.

Thoughtexchange, however, allows meaningful group discussions to take place with anywhere from 5 to 50,000 people. Its three-step process gives everyone an independent and equal voice, eliminates the need for dozens of meetings, and removes the bias created by loud positional voices. And, it accomplishes that by asking 2-3 open-ended questions with only a 10-15 minute time commitment at each step.

Learn more about the Thoughtexchange process below, and how it helped 5 organizations in their strategic planning.

A process that builds trust

The first step – Share – is like a poll. You ask open-ended questions and receive direct answers from each participant.

Thoughtexchange's second step - Star - transforms the process into a *conversation*. It gives people an opportunity to see the thoughts they submitted surrounded by the thoughts of others. It provides each individual with an opportunity to consider new perspectives they may not have thought of, perspectives that differ from their own, or ones that resonate with their own thinking. And because the process takes place in private, at the participants' convenience, they can assign stars to the ones that matter most or change positions freely.

In the last step – Discover – all of the thoughts that were collected and evaluated by the group are shared back to everyone that took part in the Thoughtexchange. Discover provides an opportunity for each person's contribution to be validated and put into the context of the group's collective thinking.



Participants share answers to open ended questions



Participants consider ideas from others and add stars to the ones they like best



Everyone discovers what is important to the group

Meaningful questions surface core values

Educo, a charitable organization that uses wilderness adventures, community-based projects and international journeys to provide transformative learning experiences for youth, recently used Thoughtexchange for its strategic planning. To define its core values, Educo's board asked 109 members *What contribution has Educo made to your life?* In response, 331 stories were submitted and 7,915 stars were assigned to the ones that resonated most.

Thoughtexchange then themed the responses into the three elements of Educo's strategic plan. "From there we had the elements of our Vision, Mission, and Values," says Dr. Ann Skelcher, Educo's Board Chair. "We also used the results to look for alignment in the work we did as a leadership team."

Record-breaking participation

Alignment with the broader group is essential, but can be difficult to pin down if engagement numbers are low. For school districts, like Spokane Public Schools in Washington and Ottawa-Carleton District School Board, looking for alignment becomes even more challenging as their stakeholder base is not only incredibly diverse but often numbers into the tens of thousands. “Thoughtexchange affirmed for us that people truly want to be engaged, but didn’t always have the right tools to become engaged before,” adds Kevin Morrison, Spokane’s Director of Community Relations.

“One of the most powerful things for me was the dramatic increase in participation and the connectedness to our stakeholders we were able to achieve with Thoughtexchange,” says Paula Hall, Ottawa-Carleton’s Strategic Business Analyst. In fact, Thoughtexchange’s ability to create meaningful two-way dialogue with tens of thousands of people was something that no other engagement tool was able to offer. In fact, Ottawa-Carleton’s strategic plan was informed by almost 14,000 stakeholders who contributed over 42,000 thoughts about their own priorities and assigned close to 650,000 stars to the ones that mattered.



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KEVIN MORRISON

DIRECTOR OF COMMUNITY RELATIONS, SPOKANE PUBLIC SCHOOLS

Using valuable opportunities to build momentum

Consensus building is an opportunity to create momentum. However, if the process takes too long those involved begin to lose their enthusiasm. Ingrid Liepa of The Connecting Link Consulting Services has been using Thoughtexchange to facilitate strategic planning since 2010. “The efficiencies are very valuable because time is money. It allows me to ask board and staff, and sometimes even members, about what they need to be talking about before walking in the door. Thoughtexchange’s ability to mirror what’s going on in the collective mind – and inside of a structured process – is so valuable,” she explains.

“Prior to Thoughtexchange, my consultations would essentially be discovery processes. With Thoughtexchange you’ve done the discovery. You know what the preferences are, you can see where the dynamic tensions exist, and then can build a facilitated plan to work through those. It just saves a ton of time in the strategic planning process,” she adds.

Allnorth Engineering, a multidisciplinary engineering and technical services consulting company, shared the same experience. Like many organizations, Allnorth organized leadership retreats to bring its team together for strategic planning. However, in addition to concerns around the time spent gathering thoughts, they also had concerns about how consistently the learning from the retreat would be shared back to the rest of the organization.

To address these concerns, Allnorth used a staff-wide Thoughtexchange to gather information from their employees. They then used a leadership-focused Thoughtexchange to create a starting point for their work so they could use their face-to-face meeting time for planning and creating action items that were in alignment with the priorities of their stakeholder base.



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INGRID LIEPA

THE CONNECTING LINK CONSULTING SERVICES

Integrating the plan

Discovering actionable items and translating them into day-to-day strategies is also a familiar challenge for many. However, Thoughtexchange’s ability to provide both organization-wide and detailed department-focused information provides a tangible starting point.

“The breadth of feedback that we received through the Thoughtexchange process really allowed us to move quickly from the collection of ideas to the actual definition of our top priorities,” says Hall of Ottawa-Carleton’s experience. “The process is great because it goes from the 30,000 foot level, right down into the details very quickly. You get to see what everyone is really thinking,” says Morrison of the benefits to Spokane’s planning process.

Moving forward

A fully integrated plan can move everything, and everyone, in the same direction. The alternative, working out of alignment, results in unachieved goals as people work at cross-purposes and lose trust in the plan. Moreover, working without the ideology that a strategic plan represents creates inconsistent messages, which too can diminish trust. A process that is transparent and inclusive can ensure that everyone involved feels like their voice has been heard and considered.

Taking that a step further, Michele Giroux, Executive Officer of Ottawa-Carleton School Board felt that stakeholder buy-in came full circle when their strategic plan was finally presented to the public. "When people were able to see the list of priorities in the Discover step, and then again in our draft plan, it affirmed for them that our process was valid, and our plan had come from a place where we did listen to stakeholders.



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PAULA HALL

BUSINESS ANALYST, OTTAWA-CARLETON DISTRICT SCHOOL BOARD



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