

STARBUCK ACADEMY · LEARNER WORKBOOK

Strategy and Vision

Leading with direction, clarity and purpose

Your personal workbook for the ten-lesson programme. Use it to capture your thinking, complete each week's workplace task and keep your strategy alive long after the programme ends.

Name

Organisation

Starbuck & Associates

Coaching and leadership development · academy.starbuckassociates.com

WELCOME

How to use this workbook

This workbook sits alongside the ten video lessons in the Strategy and Vision programme. Each lesson is short; the real learning happens when you apply the ideas to your own team or organisation.

Estimated learning time: 6 hours

10 lessons

10 practical tools

For each lesson

- Watch the video lesson in the Academy.
- Read the key ideas and answer the reflection questions in this workbook.
- Complete the workplace task from the video, using the matching tool at the back of the workbook.
- Write down one commitment you will act on in the next fortnight.
- Complete the short knowledge check in the Academy to mark the lesson complete.

Programme outline

Lesson	Title	Practical tool
01	The leader as strategist	Tool 1: Strategic Thinking Time
02	Understanding where you are now	Tool 2: Current Position Scan
03	Creating a compelling vision	Tool 3: Vision Builder
04	Turning vision into strategy	Tool 4: Strategy on a Page
05	Building the right team	Tool 5: Team Capability Map
06	Setting up the team for success	Tool 6: Team Charter
07	Communicating the strategy	Tool 7: Strategy Story Planner
08	Aligning goals and measures	Tool 8: Line of Sight Map
09	Leading through change and setbacks	Tool 9: Setback Review
10	Keeping strategy alive	Tool 10: Keeping Strategy Alive

When you have completed all ten lessons and knowledge checks, you can download your Starbuck & Associates certificate of completion from the Academy.

The leader as strategist

Many senior leaders are extremely busy and still feel they are not moving forward. This lesson looks at your role as a strategic leader: the shift from managing today to shaping tomorrow, what strategy really is, and why protected thinking time matters.

Key ideas

- Managing is about running today well; leading is about shaping tomorrow. Senior leaders need both, but as you move up, more of your value comes from the direction you set.
- Strategy is a set of clear choices about where you will focus your time, money and people, and just as importantly, what you will not do. A team can work very hard in the wrong direction.
- Your vision describes where you are going. Your strategy describes how you will get there and win. Your plans describe what you will do next. You need all three, and they need to connect.
- Strategic thinking needs time, and time is the first thing senior leaders give away. Put regular thinking time in your diary and protect it.

Reflect

Roughly how much of your week goes on running today, and how much on shaping tomorrow?

What is changing around your team or organisation that you have not yet had time to think about?

What should your team stop doing?

Your workplace task

Block two hours in your diary for thinking time. Use it to write down what you believe your team or organisation should look like in three years, and the three biggest choices you think you face. Use Tool 1, the Strategic Thinking Time sheet, and keep your notes, as you will build on them throughout the programme.

My commitment. In the next two weeks I will...

Understanding where you are now

Before you can set a direction, you need a clear and honest picture of where you are now. Many strategies fail not because the vision was wrong, but because the starting point was misunderstood. This lesson shows how to build that picture from the outside in, and from the inside out.

Key ideas

- It is tempting to skip this step because you think you already know your team and market. An honest starting point is what makes strategy work.
- Look outside first: changing customer needs, what comparable organisations do well, and trends in your sector, technology, regulation and the economy.
- Then look inside: your real strengths, the gaps in skills, systems or resources, and your culture. A SWOT review brings the outside and inside views together.
- Do not build the picture alone. Your team, customers and partners see things you do not. Then find the few issues that really matter: the themes that keep coming up.

Reflect

What would your customers or service users say you do well, and where do you let them down?

How do people in your team behave when nobody is watching?

Of everything on your list, which few issues would make the biggest difference if solved?

Your workplace task

Gather three outside views of your team or organisation. Speak to a customer, a partner and a colleague from another part of the business, and ask what you should keep, stop and start. Record what you hear in Tool 2, the Current Position Scan, and add it to your notes from lesson one.

My commitment. In the next two weeks I will...

Creating a compelling vision

People rarely get excited about a plan or a budget. What they respond to is a picture of a better future, and a sense that they are part of creating it. This lesson looks at what makes a vision work, how to shape it with your team, and how to test it.

Key ideas

- Good visions are clear, ambitious, believable and meaningful. A vision that is vague, unrealistic or purely financial rarely inspires anyone.
- The best visions are rarely written by one person alone. Share what you learned about where you are now, and ask your team what great would look like.
- Keep it short enough for people to remember and repeat. Use plain language, not management jargon, and make it vivid so people can picture it.
- Test your draft with others. Do they understand it? Does it excite them? Most importantly, does it help them make decisions?

Reflect

If your team succeeded beyond expectations, what would be different in three years' time?

Who in your team should help shape the vision, and how will you involve them?

How would your vision change the decisions people make day to day?

Your workplace task

Draft your vision in no more than two sentences, using Tool 3, the Vision Builder. Test it with three people, including at least one member of your team, and ask what it means to them and how it would change their decisions. Refine it based on what you hear.

My commitment. In the next two weeks I will...

Turning vision into strategy

A vision on its own changes very little. What turns it into reality is a set of choices about where you will focus. This lesson covers choosing your priorities, deciding what to stop, making resources follow priorities and capturing your strategy on one page.

Key ideas

- Most teams can only make real progress on three to five big priorities at a time. More than that and effort is spread too thinly.
- Strategy is as much about what you stop as what you start. Time, money and attention for new priorities have to come from somewhere.
- If a priority is truly important, it needs people, budget and leadership time. Check that where money and time actually go matches what you say matters.
- Capture your strategy on one page: your vision, your three to five priorities, how you will measure progress on each, and who will lead each one.

Reflect

Given where you are now and where you want to be, which few choices matter most?

What current work would you stop or pause to make room?

Where does your time and money actually go, and does it match your priorities?

Your workplace task

Write your strategy on one page using Tool 4, Strategy on a Page: your vision, three to five priorities, one or two measures for each, and an owner for each. Add a short list of the things you will stop or pause to make room.

My commitment. In the next two weeks I will...

Building the right team

Strategy and people are closely linked: the capabilities in your team set limits on what your strategy can achieve. This lesson looks at the capabilities your priorities need, how your current team compares, and how to close the gaps.

Key ideas

- Look at each priority and ask what skills, experience and behaviours you will need to deliver it.
- Look honestly at the team you have: real strengths, untapped potential and clear gaps. Talk to people about more than their current role.
- There are three main ways to close a gap: develop the people you have, recruit people with the experience you need, or partner with others.
- The strongest teams bring together different strengths, backgrounds and ways of thinking.

Reflect

Which of your priorities is most at risk because of a skills or experience gap?

Who in your team has potential that is not yet being used?

Is your team balanced, or are there ways of thinking missing?

Your workplace task

List the key capabilities your strategy needs and map your current team against them using Tool 5, the Team Capability Map. Mark each one as a strength, a partial gap or a clear gap, and note whether you will develop, recruit or partner to close it.

My commitment. In the next two weeks I will...

Setting up the team for success

One of the most common reasons capable teams underperform is simple confusion about roles, responsibilities and decisions. This lesson covers making roles explicit, agreeing how you work together, building trust and bringing it all together in a team charter.

Key ideas

- Link each person's role to the strategy, agree who owns each priority and key decision, and for bigger decisions be clear who decides, who is consulted and who is informed.
- Agree how you will work together: your regular meetings and what each is for, how you share information, how you make decisions and how you handle disagreement.
- Trust grows when people keep their promises, admit mistakes, share information openly and treat each other with respect. As the leader, you set the example.
- A team charter is a short document the team creates together, setting out your purpose, priorities, roles and ways of working.

Reflect

Where is there confusion in your team about who does what, or who decides?

How does your team handle disagreement today?

What example are you setting on trust, openness and inviting challenge?

Your workplace task

Hold a session with your team to agree a simple team charter using Tool 6: your purpose, your priorities, your roles and three to five ways of working you all commit to. Share it afterwards and agree when you will review it.

My commitment. In the next two weeks I will...

Communicating the strategy

A useful test of any strategy is to ask people in your team to explain it in their own words. If they cannot, it is not yet working. This lesson covers telling your strategy as a story, answering the personal question, repeating the message and making communication two-way.

Key ideas

- People remember stories far better than slides. Tell your strategy simply: where we are now, where we are going, why it matters and what we will focus on.
- People's first question is usually personal: what does this mean for me? Answer it honestly, even when you do not have every answer yet.
- Messages need repeating many times, through different channels, before they sink in.
- Communication is not just telling. Create space for questions, concerns and ideas, and listen properly.

Reflect

If you asked five people in your team to explain the strategy, how similar would their answers be?

What will people in your team want to know about what it means for them?

Where could you create more space for questions and ideas?

Your workplace task

Tell your strategy story to your team in no more than five minutes: where we are, where we are going, why it matters and what we will focus on. Plan it with Tool 7, the Strategy Story Planner. Afterwards, ask two or three people to explain it back in their own words, and notice what they remember.

My commitment. In the next two weeks I will...

Aligning goals and measures

Each strategic priority needs to be broken down into clear goals, with a small number of measures that show whether you are moving towards your vision. This lesson covers setting good goals, choosing measures that matter, creating line of sight and keeping progress visible.

Key ideas

- Break each priority into goals: what will be achieved, by when and by whom. Good goals are specific, measurable, challenging but realistic, and have a clear timescale.
- Measure what matters, not what is easy to count. Use leading measures, which show early signs of progress, as well as lagging measures, which show final results. A few well-chosen measures create focus.
- Every person should be able to see how their own goals connect to the strategy. This line of sight gives work meaning and helps people prioritise.
- Review progress regularly in team meetings and one-to-ones, not just at the end of the year. Celebrate progress and look openly at what is off track.

Reflect

Can every person in your team see how their goals connect to the strategy?

Which of your current measures count what is easy rather than what matters?

How often does your team look at progress together?

Your workplace task

Check the line of sight in your team using Tool 8, the Line of Sight Map. For each strategic priority, list the goals and measures that sit beneath it, and check that every team member has at least one goal clearly linked to a priority. Fill any gaps you find.

My commitment. In the next two weeks I will...

Leading through change and setbacks

No strategy survives contact with reality unchanged. This lesson covers holding the direction firmly and the plan lightly, how people respond to change, communicating through uncertainty, learning from setbacks and looking after your team.

Key ideas

- Keep your vision and main priorities stable, but be ready to adjust the plan as you learn.
- People respond to change in different ways. Some are energised, others anxious. During uncertainty, be as open as you can about why, what you know and what you do not yet know.
- When a project fails or a goal is missed, the way you respond sets the culture. Look for learning, not someone to blame, or people will hide problems in future.
- Leading through change is demanding. Watch for signs of strain such as tiredness, irritability or withdrawal, and check in with people individually.

Reflect

How do you usually respond when something goes wrong, and what does that teach your team?

Who in your team may be finding change hardest right now?

Where is uncertainty being filled with rumour, and what could you share?

Your workplace task

Review one recent setback or change with your team using Tool 9, the Setback Review. Ask what happened, what you learned and what you will do differently. Agree one change to your plans as a result, and share it.

My commitment. In the next two weeks I will...

LESSON 10

Keeping strategy alive

Many strategies fail not because they are wrong, but because they are forgotten. In this final lesson we look at keeping your strategy alive over the long term: a review rhythm, keeping the direction visible, protecting your thinking time and growing as a strategic leader.

Key ideas

- Hold a short monthly check on progress against your priorities, and a deeper quarterly review of whether the priorities themselves still make sense.
- People need to hear the direction more often than leaders expect. Connect everyday decisions and achievements back to the vision, and when you recognise good work, say how it moves the strategy forward.
- Urgent problems crowd out important thinking. Protect regular time in your diary to step back and look ahead.
- Strategic leadership grows with practice and reflection. Look back at what has worked, ask for feedback, and keep learning.

Reflect

What usually happens to strategies in your organisation a few months after launch?

How could you connect recognition of good work back to the strategy?

Who could give you honest feedback on your strategic leadership?

Your workplace task

Put your strategy review rhythm in the diary using Tool 10, Keeping Strategy Alive. Book a short monthly progress check and a quarterly review with your team, and protect one regular slot for your own strategic thinking.

My commitment. In the next two weeks I will...

PART TWO

The Strategy and Vision toolkit

Ten practical tools, one for each lesson. Use them in the programme, then keep coming back to them whenever you plan, review or reset your direction.

Strategic Thinking Time

Use your two-hour thinking block to set out where you want to be and the choices you face.

Date and time of my two-hour thinking block

How my week splits now between managing today and shaping tomorrow

What is changing around us?

What should we stop doing?

In three years, if things go well, our team or organisation will look like...

The three biggest choices we face

Current Position Scan

Build an honest picture of where you are now, from the outside in and the inside out.

Strengths (inside)

Weaknesses and gaps (inside)

Opportunities (outside)

Threats (outside)

Three outside views (customer, partner, colleague): what we should keep, stop and start

Themes that keep coming up

The few issues that matter most

Vision Builder

Draft, test and refine a short, vivid vision for your area.

What would great look like in three years? (ideas from my team)

What will customers, colleagues or the community see and feel?

My draft vision (no more than two sentences)

Check: is it clear, ambitious, believable and meaningful?

Testing with three people: what it means to them and how it would change their decisions

My refined vision

Strategy on a Page

Capture your vision, priorities, measures and owners on a single page.

Our vision:

Strategic priority	Measures (one or two)	Owner	Resources it needs
1			
2			
3			
4			
5			

What we will stop or pause to make room:

Do our people, budget and leadership time follow these priorities? What needs to move?

Team Capability Map

Map your team against the capabilities your strategy needs.

Capability needed	Linked priority	Strength, partial gap or clear gap	Develop, recruit or partner	First action

People with potential not yet being used:

Is the team balanced? Which strengths or ways of thinking are missing?

Team Charter

Agree with your team how you will work together to deliver the strategy.

Our purpose

Our priorities from the strategy

Our roles: who owns each priority and key decision

Bigger decisions: who decides, who is consulted, who is informed

Our three to five ways of working

How we will handle disagreement

Date we will review this charter

Strategy Story Planner

Plan a five-minute strategy story and check it has landed.

Where we are now, honestly

Where we are going, and what will be different

Why it matters

What we will focus on

What does this mean for me? The questions I expect, and my honest answers

Explain-back: what two or three people said in their own words, and what they remembered

Line of Sight Map

Check every goal and every person connects to a strategic priority.

Strategic priority	Goals beneath it (what, by when, who)	Measures (leading and lagging)	Team members with a linked goal

Team members without a clearly linked goal, and what I will do:

When and how we will review progress:

Setback Review

Review a setback or change with your team, focusing on learning rather than blame.

The setback or change we reviewed

What happened?

What did we learn?

What will we do differently?

The one change to our plans we agreed, and how we shared it

Signs of strain to watch for, and who I will check in with

Keeping Strategy Alive

Put your strategy review rhythm in the diary and keep growing as a strategic leader.

Rhythm	What we will look at	Who takes part	Date booked
Monthly progress check			
Quarterly strategy review			
My strategic thinking time			

How I will keep connecting everyday work and recognition back to the vision:

Who I will ask for feedback on my strategic leadership:

The most important things I will keep doing from this programme:
