

JANUARY-FEBRUARY 2021

Strategic Planning and Facilitation



"As the CEO, you're expected to be a key part of strategic planning, but you can't really be a valuable participant in a conversation that you're also facilitating."

— **JEREMY ANDERSON**
CEO, FARM CREDIT OF
SOUTHERN COLORADO

Successful businesses know that strategic planning is essential to long-term success. By engaging external support for planning and facilitation, businesses get the most out of the process. Skilled external support provides new perspectives, outside expertise and a strong focus on outcomes while allowing full participation by everyone involved in the discussion.

"Most Farm Credit and ag co-ops have annual strategic planning sessions, but the depth and scope varies immensely from organization-level topics to a more specific focus on a single issue such as customer experience," says Jean Cantey Segal, Chief Learning Officer for FCCS. "An outside perspective can help plan and guide these conversations to reveal new opportunities, overcome challenges and even enhance your position with customers and employees."

FCCS offers both strategic planning support and general facilitation services. Facilitation occurs during a meeting to manage the agenda and encourage open conversation and creative thinking while guiding the group to achieve the desired outcomes. Professional facilitators apply their understanding of group and discussion dynamics, business issues, communication styles and a variety of proven techniques to optimize the discussion.

"It's often valuable to have a facilitator who doesn't have a stake in the outcome direct the conversation to make sure all voices are heard, including the board chair or CEO who are often tasked with, and distracted by, taking on a facilitator role," says Leslie Hilton, Vice President of Governance/Board Development for FCCS.

Strategic planning support introduces subject matter expertise, bringing outside insights from either the facilitator consultant or third party expert on a particular topic, including many of the industry experts FCCS works with in other capacities. Beginning with the session objective, FCCS helps design an engaging strategic planning event, develop the agenda, content and discussion topics, and establish session goals. During the session, professional facilitation ensures free dialog, full participation and continued focus on outcomes.

Farm Credit of Southern Colorado (FCSC) worked with FCCS to plan and execute a board strategic planning session last August with the goal of identifying a set of strategic pillars to guide the business for the next several years. FCCS' Jay Lux, Vice President of Organizational Development, worked with the board in advance, asking questions and teeing up the planning session so directors were prepared for a broad, forward-looking conversation. Held in a large hotel meeting space to accommodate social distancing requirements, Jay and colleague Lisa Cavanaugh, Vice President of Leadership Development Experiences, introduced and worked through a PESTEL analysis with the FCSC team to explore how political, economic, social, technical, environmental and legal issues are impacting, and may impact in the future, its business operations.

"The PESTEL analysis was an extremely effective framework for our discussion, which Jay facilitated to make sure everyone was able to contribute," says Jeremy Anderson, CEO of Farm Credit of Southern Colorado. "Throughout the session, Jay kept us focused on our objectives, and we were able to define the strategic pillars that are now guiding all our business decisions and the individual efforts of our employees. We're all driving toward the same goals at every level in the organization."

Each of the five strategic pillars – customers, employees, operational excellence, financial performance and serving as a voice for agriculture – has three to five annual goals to support consistent progress. The impact of understanding our vision and knowing how they're connected to it, combined with a separate company culture initiative also guided by FCCS, has delivered measurable results: a December employee engagement survey revealed significantly higher levels of engagement than the previous survey.

"As the CEO, you're expected to be a key part of strategic planning, but you can't really be a valuable participant in a conversation that you're also facilitating," says Jeremy. "Having an expert facilitator, who knows Farm Credit well and who has exceptional insight into the broader business environment, was immensely valuable to us."

Not every board or senior leadership meeting requires an outside facilitator, of course, but when key decisions are being made or strategies are being set, or when the topic being discussed is complex or contentious, the value can be enormous.

"Because an outside party is impartial and has no preconceptions about what should or shouldn't happen or be said, an experienced facilitator can create an environment that allows for a diversity of perspectives and voices," says Jay. "The facilitator can ask probing questions, push on assumptions and challenge deeper thinking as the group explores more forward thinking options."

For more information about FCCS' strategic planning and facilitation services, contact [Jean Cantey Segal](#) at 303.721.3278 or [Leslie Hilton](#) at 303.721.3215.