

Facilitation of Strategic Planning / Thinking

Case Study

“When leaders operate with the organisation in mind, not just their own function, strategy stands the best chance to make impact.”

David Romano, Facilitator



The Client

The client is one of the larger private health insurers in Australia, providing tailored cover for selected community membership.

Their focus on the well-being of members and dedication to providing market leading health insurance products and services, has resulted in this company becoming one of Australia's fastest growing health insurers.

The Challenge

With the departure of a long-serving CEO, a new CEO arrived with the mandate to renew and redefine the direction of the organisation ensuring it remained relevant and thrived into the future.

This initiative required a cohesive executive approach to the development and implementation of the new strategic direction. Herein lay the greater challenge – to bring together a mix of long serving and new executive team members so they operated as a truly cohesive team under the direction of the CEO.

HCI was selected to support the organisation due to the following factors:

1. We make it our business to know our clients' environment, challenges and unique circumstances.
2. We provide only customised solutions meeting the needs of where the client is at and therefore confident it's the right solution for them.
3. HCI's facilitation processes have a balance between defining strategy and direction, building leadership capabilities and the high performing culture to make it happen.

The Solution

HCI proposed a two prong approach – a deep strategy planning process with an implementation bias for getting the Executive team to think and act as one. This ensured both strategy development and effective execution carried equal weight, guaranteeing strategic intention translates into business impact.

The Approach

For five years now HCI has facilitated the strategic planning and leadership activities. The approach typically commences with an intense conference retreat prior to the organisation's budgeting process. The Executive and wider Management Teams participate in these.

Leadership development activities are part of the process including a customised Executive Capability 360 used to give feedback not just on strategic capability but also on the leadership attributes critical for the organisation's success.

Pre-conference analysis is used to review what had happened to date, check in on the external environment, collect feedback on the leadership team's performance and ensure commitments made at the previous off-sites are tracking as expected.

Scenario planning, environmental analyses, execution planning, 'blue ocean' thinking and a range of other activities feature heavily in the conference. A common theme of moving from intent to impact has proven useful as projects are built from these strategic retreats and then implemented back in the business environment.

Results Achieved

The results have been significant – silos continue to be broken down, leaders operate with the organisation in mind not just their own function, and the wider Management Team have been developed in readiness to step up to the Executive Level. Strategy within the organisation is clearer than ever, and succession planning has been a key component of ensuring this strategic thinking capability is not lost across the different levels of management as team members come and go.

Through the process, HCI has been an ally to the CEO and the leadership community that now sees them thriving in a complex and challenging market place.