

# 3 Steps to Create Your 2022 Strategy Despite Uncertainty

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## SUMMARY KEYWORDS

ceo, tools, pandemic, people, culture, business, destination, questions, ginny, strategy, thinking, vision, important, vision board, office, customers, returning, world, museum, decisions

## SPEAKERS

Ginny Bianco-Mathis, Mitch Simon, Tara Rethore

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**M** Mitch Simon 00:10  
Welcome to another episode of team anywhere where CEOs, leaders and experts at building teams, companies, organizations, and amazing cultures

**G** Ginny Bianco-Mathis 00:21  
share how to lead from anywhere in the world. I'm your co host on the East Coast chicken Bianca Mathis,

**M** Mitch Simon 00:28  
and I'm your co host on the West Coast, Mitch Simon. And we invite you to join us team anywhere. Trying to figure out how to create strategy in this new world of uncertainty. Well, according to Tara Rethore, an expert on strategy, governance and executive leadership, and author of charting the course CEO tools to align strategy and operations. The pandemic has given us all the opportunity to become more precise and visionary as we build strategies into the future. Her formula is that we start with the destination, focus on value and then build on what's working. First, get clear on where you're going, because most likely, success looks much different now. Second, determine where you've created the most value these days because defining your value helps get your employees better engaged, and your customers more excited. Finally, by utilizing the plus delta tool in her book charting the course, you can strengthen your company by building on what's working to generate revenue in the new business environment. As long as you follow these steps, your strategy will lead to greater success as you team anywhere.

**G** Ginny Bianco-Mathis 01:49  
Welcome to another episode of team anywhere. I'm your host, Ginny Bianco-Mathis on the east coast. And I am here with my wonderful co host Simon on the west coast. And today we have a repeat distinguished guests, Tera Rethore, who is an expert, a practitioner and a seasoned consultant in the areas of strategy, leadership, and teams. And not only does she do heavy consulting, and right in this area, she holds groups of leaders, where she helps them share

what they are going through and help them think through the future of their organizations and themselves personally. And once again, the topic of returning to the office is back on the agenda. And much of the news and conversation focuses on when and how to return to work. As if we all have been on vacation for the last day. CEOs are alternately applauded or vilified for their statements about what their organizations will do. So first of all, Tara, welcome.

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Tara Rethore 03:09

Thank you, Ginny. Hey, Mitch, nice to see you or hear you guys today. It's really exciting to be back. I appreciate the invite.

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Ginny Bianco-Mathis 03:19

So good to be interacting with you again. So what are you hearing, Tara?

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Tara Rethore 03:25

Well, I think you know what's interesting, Ginny, is that the most of the conversations about returning to the office, reduce this whole thing to a binary question? Are we in the office? Are we out of the office? And that seems to be the question. But then they add in hybrid. And that's sort of intended, I think, to bridge the two options. And they don't necessarily explain explicitly what that means, like, how do they define it? And then all this conversation ensues? I wonder kind of is when and how we returned to the office really the right question, because on its own, it's not helping to increase the clarity. It's not helping people to understand what that means. And it doesn't help anybody take a decision about whether they should do anything or how they should proceed. So I think CEOs need to start thinking more strategically about this.

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Ginny Bianco-Mathis 04:25

Oh, wow, what a key word there. That's a wonderful segue. I understand you have this wonderful, fabulous new book, looking at it right now. And it's all about making strategy work. And what I love about it is that it is filled with tools to assist strategic thinking, and the kinds of decisions that CEOs and their teams really have to grapple with data these days. So when ever a leader or team needs a tool to think things through or reach decision, I noticed there's A tool to guide the process. I kept tested it oh my god, there was the tool. I have to say to someone who works in this area, I think that was a masterful fate, you really took that process and codify it. I think in a way, that's going to help a lot of people. Oh, thank you. How do executives get to the root? and address this idea of getting and going back to work strategically?

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Tara Rethore 05:29

Well, you know, thank you. First of all, Ginny, I think that's awesome. And it really has been quite an adventure. One of the things, as I say in the book is that much depends on where you are in your strategic journey. And you alluded to that as well. So yeah, there are 25 tools, they all have the AIDS, etc. But how do you then choose which one of those is going to make the best use of your time and effort and get you to those decisions? And so then, for this

particular challenge, you have to kind of step back and say, all right, there are three things I think you need to do that I would recommend one is start with the destination, to focus on value, and then build on what's working. I think those are the three things that are most likely now.

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Ginny Bianco-Mathis 06:16

Very powerful. Yes, exactly. Exactly. take you forward, very powerful technique. So let's, let's divide those up and look at them a little more closely. So let's start with the destination. What do we do with that?

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Tara Rethore 06:33

Well, before you can consider how or when you got to start with why, right? What, what end? To what end? It's a question I asked all the time with my clients, and all the executive, it's like To what end? What purpose? Why are we doing this? What's the rationale? That's your destination? So if you're starting with your destination, you have to be able to answer the question, to what end? To what end? Are we returning to the office? What is it that we're trying to achieve? So it's also your vision, right? It's the thing that you're trying to do. And in the last 18 months, your world has fundamentally shifted, it doesn't seem to matter what business you are in, where you're located, how you work in the past versus how you're working now, your world has shifted. And so what what are you trying to achieve? And then how is that impacted you? So I think at that point, I take a look at your external landscape, right, let's go look at what the business context is, we need to kind of let go of the old, right, that tool that helps you impact, assess the impact of what the changes in your landscape have done to your business, or what they might mean for you going forward? What impact has that had on your vision, the destination, what you're trying to achieve? The why. So what's changed?

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Ginny Bianco-Mathis 08:07

Right, right. And, and obviously, or not, so obviously, to some teams, doing that, extend that extend that sorry, external landscape questioning is paramount. So they can step all the way back and not deal with assumptions, but rarely look at some hard concrete questions that are going to make them take their their own tunnel version off. And I know from being another tool, lady, that such tools facilitate the right conversation. So as use of what really has changed. So let's move on to

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Mitch Simon 08:56

I want to, I want to ask a question. Yeah, so Tara, we, as a as a CEO, hold on one sec. As a CEO, I have my I have my world before COVID we all came the office, rolling our butts in our chairs, you know, 810 12 hours a day, and I was very happy. And now COVID happened. And and it's hard for me to vision something different than what I experienced. So how can I How can I given you know, given now this new, you know, the new technologies are out there, how can I create our Do you have any tools, they're going to help me create a vision of what I want the new world to look like?

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Tara Rethore 09:44

Sure. I mean, there are tools, obviously in the book that you can use. However, I think what's most important is to do exactly what you've just said met and that's kind of step out of what your current thinking is and one of the reasons why I start with Have a destination and be an external landscape is that we're trying to figure out what other things

are looking like, like get out of wherever our current office situation is right? Get out of our current world and start expanding that thinking. And a vision board, for example, is a wonderful way of just thinking beyond the moment thinking about beyond what this looks like. And I think sometimes that may mean that your vision needs to change completely. Sometimes you say, you know what, we still want to get there. But everything else around it may be different or getting there is defined differently. So success may still look a little differently. So you have to kind of ask that question again around what does success look like? So visioning Yes, you can go back and look at it. But the more important pieces that it's not just the words on the page that describe your vision, it's really understanding what it means. I had a CEO do that recently, he really had to step back and say, Okay, yeah, we want growth. But, gosh, that's not helpful. I need to understand and be more explicit about what do I mean by that? How do we know if we're there? And he really went back to the drawing board in many respects. And if you do a vision board, you're literally on a dry drawing board. He really had to stop and think about it again and say, okay, hang on, what do we think about? And what does that look like, and started over. And he didn't change his vision, in the end, he started talking about it in a different way, so that it had more meaning for the folks in his organization. So it may not be that you've got the wrong destination, it may just be that you need to really place it into a different context, so that people get what it means.

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Mitch Simon 11:50

Can you give us some examples of, of things that you and the CEO were creating that are that will give our audience more of an understanding of what to look for?

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Tara Rethore 12:02

Sure, some questions around what's changed? What's different versus last year? What do we like about what we're doing? Right? In this world? It's not just about place as well. So things like, what is the most what are the relationships that we need to be effective in achieving our objective? People don't often think about the relationships, they think about how they do business, they think about who they're talking to in the hall or on the phone. It's really about how are you creating those relationships? And then thinking through Do we have the relationships we need right now for where we're headed? Or do we need to be adjusting that? Are we able to nurture those relationships? What outcomes do we need? What, what's the most important outcome we need that we know will help us drive towards success? If we can identify that then again, you can start thinking through a little differently around the how and the where, with respect to the big question we've talked about? Do we? How do we return to the office? Does it really matter? So those are the questions that we started looking at, in addition to the big one that I mentioned earlier, which was, what does success look like? And we started big, and started driving down, we need X number of new customers, we need more percent, a higher percentage of new versus returning customers, they were way too dependent on their current customer base and their customer base, their worlds have changed. So they needed to really rethink that piece as well. And they needed new partners, they needed different relationships. And those are the steps that they're taking to move forward. And that has dictated how they handle their offices, their spaces, because they're also in different locations, right. So their situation like so many people is different. Depending on the specific facility you're talking about. It gets even more important if you've got a manufacturing or distribution type of business, where people need to be together.

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Ginny Bianco-Mathis 14:14

So if you're doing a vision board, it's different from what might have been done previously. I like to say I even say the vision statement is no longer valid. I like to say you need a vision scenario. It looks like this. It feels like this. Why? Yeah, it may have a number attached over here. When but it's a how the why and maybe that's the gift the pandemic has given us. It's forced us to look at the how and the why.

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Tara Rethore 14:52

Well, yeah, and it kind of goes back to so the how and the why are key pieces of this of the strategy right? Because the strategy in my definition, and you and I, Giny and, and Mitch, have talked about this before, the way I think of strategy is fairly simple. It's the set of decisions and actions you need to get you where you want to go. So that clearly involves how and why you got to know the To what end. And the vision piece of that is, of course, the destination the To what end the why. But it's also got to be compelling, it's got to be something that people can picture in their minds. It's one of the reasons why I like that vision board, because it does bring in visuals. But it doesn't have to be all pictures or images. What you suggested and what you were saying, Ginny, is that it needs to be bigger than just a statement. It's not a set of words. It's got to have that meaning. And I think that's the drawback to a statement. And it doesn't matter what situation where to end pandemic or not. I think the pandemic I agree with you has helped to really illustrate the limitations of a statement.

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Ginny Bianco-Mathis 16:07

Yeah, well, then that beautifully takes us to the next overlay. So you got your vision board, you've done this environmental checklist scan, and you've seen what's changed. You have some more parameters around what you want this vision to be, but to a point you just made to bring it alive. You need to add your second element, which I believe you said was value. Yeah, to speak to that.

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Tara Rethore 16:37

Absolutely. whatever business you're in whatever sector you serve your business to business, your business, to consumer, business to government. whatever work you do, you've got to deliver value. If you don't add value, you're out of business period. It's common. It's also fundamental and foundational, right? So it doesn't depend that challenge there doesn't depend on where people physically sit at all. Certainly, at least in my experience, and I've written a few articles about this. Customer Service, right people's patience with the blame COVID rationale is wearing quite thin. Right? So it doesn't mean COVID no longer challenge. It's just okay, we've had 18 months at least, to adapt and figure out how to manage that challenge. Let's get with it. People really important in your front office, and your front office looks different depending on what sector you're serving, right. So there are two questions. What value do you add for your customers? Right, and how you deliver that value? And then how well have you delivered on that value, particularly over the last 18 months? If you're not delivering well, in last 18 months? You're gonna have a hard time delivering well, going forward? Don't blame COVID? Yes.

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Ginny Bianco-Mathis 18:16

I love it. Right. Right. I've heard you also speak that sometimes. If you leave that value piece out, then folks actually start to get bored with the vision. Yeah, that you? You know, all right, well, we've accomplished it. Right. And now what the value piece is almost the spark.

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Tara Rethore 18:47

I think it can be the value. Sometimes people talk about purpose, very often value. Add is tied to purpose for people. And I think so the conversations that you hear about purpose, if you dig a little deeper, you can start thinking about if this is our purpose, right? If this is the the important thing that we're doing, this is the thing that we're adding to the

universe. Right, depending on your purpose, that add value, it makes it better to be human, it makes it better to be in a community. These are the things that that staff in particular feel very passionate about, and often can bridge the gap with respect to whether or not they want to stay with an organization or take those decisions. It's the same for your customers. I think the pandemic has really highlighted that because it's not just the pandemic but it's also all of the social and personal equity questions that we have been wrestling with as a society as communities as, as individuals over Gosh, millennia. That really also came to a head in the last 18 months that start bringing that in. That's part of the change in your business. Text. And so if you can't figure out the answer to what value do we add? And how well do we add it and deliver on it? You probably can't inspire anybody, even if your business is very foundational utility structure, right? You don't need to be doing some really awesome charitable work to add value to the world, or to your customers.

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Ginny Bianco-Mathis 20:27

Right, right. And this seems a great place for you to talk about a tool you like to use the plus delta evaluation approach. I was intrigued with that.

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Tara Rethore 20:40

Yeah, the plus delta approach is one that I like for really understanding what works and what can be improved. That's the idea. The Delta in math is used to indicate change. So if you do a plus meaning additive, or keep it at a delta, meaning improve or change it, it makes a very compelling conversation around what works, what can be improved, what might we want to change? I think that's a really important tool, in this case, not always specifically for value, but for understanding the impact of the last 18 months on your value proposition. So if you're not clear on your value proposition, go back and figure out what the heck that is first, right? If you're are clear on your value proposition, and you're trying to figure out how well you delivered on the value, start thinking about what worked, what could be improved, what might we change, and I think you start coming to a, it's a very positive and forward thinking, kind of approach, because we've learned a lot in the last 18 months, really a lot. And it gives you the chance to think about that, right? And figure out which of the things that happened in the last 18 months that we used and adapted to make things better, or just to survive the pandemic, right, which is a valid outcome, right, just weathering this storm. Which of those things really worked well, because that's a new source of value for you. And it may be purely internal value for your staff. But there's plenty of research out there, you probably done time yourself, Jenny, that talks about the fact that happy customer, our staff, happy staff, contented staff staff that believe in what you're trying to do, make for very, very good customer ambassadors, no matter what business you're in. This, I did that, or that exercise with a different CEO in a different organization, because they adapted to the pandemic in a way that the CEO did not expect to their technology company. So really, where they sit, in terms of their business is less important. They're not a meatpacking plant, they are not health care, you know, they don't have to be on the ground floor with their customers, right. And they don't even have to be always together with each other for everything. However, this CEO, loves the imperson really struggled even with the fact that he had multiple offices, and he'd make the rounds, did a lot of trying to encourage FaceTime really participate. And that's where his head was. And he started looking at what's working, he had changed a good number of his behaviors, and we actually had a conversation around. Okay, let's talk about your leadership. And what's changed in your leadership. So it wasn't even just a meta compensation for the company it was in in the work that you've done and how you CEO, deliver value, what are you doing differently to make that work? And how well is it being received? And we did a had a conversation around a plus delta. That said, these are the things that are working well, these are the things I could improve. And at the end of the day, his company will be virtual forever. Forever. They've just entered a fundamental 180 degree shift for this particular CEO personally, just completely different approach for him. Right.

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Ginny Bianco-Mathis 21:00

G Ginny Bianco-Mathis 24:29

Right. Right. Yeah. You also shared with me in the past, I think a lovely example with a museum out Yeah,

T Tara Rethore 24:37

those guys. They did a fabulous job and we're talking about thinking on your feet and being nimble. So they're a museum, they have indoor and outdoor exhibits, but their exhibits curation, they're the opportunity to be there, the exploration, all of that's their value proposition. It's not necessarily different than Other museum types of venues. But everything they did relied on in person work in person interaction. And they they had to like, they were shut down like so many others. And yet it was the peak season for them. Because there they have a lot of things that happened beginning in April, every year, and go all the way through to about October that's like this most vibrant time for this particular museum and their outdoor gardens and their venues and all their programs. So they were like, oh, my goodness, we're out of business, if we don't do something, and they immediately created virtual tours faster than anybody, a team really created them. Lots of other people did that. They did it fast. And it also is not the same. And initially, it wasn't helping their bottom line, it was free. Right? They were just maintaining face literally awareness position. They had members who had already paid memberships, so they were providing things to help, kind of in the moment help them do that. The CEO, though, took them through a systemic process to really understand, you know, okay, good. We're all up and running. We're virtual. We're keeping people happy. To some extent, we're getting the word out, we're doing the things to sort of maintain the base we've got. She said, what do we do to get new people? What do we do if this thing goes on for a long time, and there are renewals, we need to have new, we need to have other, we need to have more. So she took them through a very, very systemic process, including a plus delta and other aspects to really rethink value. What's their value proposition? What does it really mean? And how might they shape that and frame that, like, talk to their customers, like, share with their members? Here's the value that we add in a very different way. You know, this is what's so exciting about it, this is what you have learned from going through this this way. And that let them preserve their revenue model. And that was really important to them, because they're highly dependent on members, gate revenue, people coming in. And sponsorships, right.

G Ginny Bianco-Mathis 27:27

So you do things differently and use and you try to come up with how to use some new tools in this virtual or hybrid, and you still a major part of the equation is still the bottom Why? Well, if you can't, you know, it sounds like this. Yeah,

T Tara Rethore 27:50

the CEO really got it, right, because basically, the CEO has been answered. So I know. You have three or four examples. You have given? You've already answered your last element, which was to build on what's working. Right. And you gave some great examples. So I'd like to go to a an overlying component. In the end here. You mentioned culture a little bit, here and there. And I wanted to build on that. What do you have to share about that? And I would expect there's a tool for that. And also, Oh, of course, there's a tool for everything. That's the beauty of it, as you said earlier. Yeah, culture, there's been lots of talk about culture as the reason for returning to the office. You hear that, for example, from Goldman Sachs, or Amazon, we are an in office culture. First of all, it's unclear what that really means. Right? Secondly, it's not helpful, right? Generally speaking, when you're in crisis, pandemic, or not, when you're in crisis, the elements of your culture that are really helpful, become really obvious, as do the elements of your culture that are really not helpful, right? So it's really important to understand what that looks like. And the key thing is that you know, culture cannot be dictated. It is however, something that CEOs executives, shape, simply by the way they behave and the decisions that they take, right. The most important thing to remember though about culture My opinion is that the culture you have, may not be the culture you need. So, Goldman Amazon, anybody else who says

we are an in office culture, that's not helpful in an out of office world. So that's not necessarily the culture they need, whether or not it's good, not relevant, just not relevant. That's, I think that's a key piece of what we have been talking about him and even in, in thinking about elements of culture, it's like, do a culture audit, and then figure out if how that works with respect to what you're trying to achieve, or the elements that you have the ones that make the most sense that are getting in the way of your vision or your ability to execute on it, or the things that are making it possible for you to do great things. The CEO of that Museum, they were in, in building in facility in museum culture, not helpful, really not helpful for them. They took that look and said, okay, we need to figure out how to deliver museum and curation without being in the building.

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Ginny Bianco-Mathis 31:19

Right? Right. That's excellent. I love that new view, towards looking at it. And I know I personally am going to spend some more time with that culture audit questions. I think it takes a leader down a path that he or she and the team may not want to go down. Because Oh, my God, you know, they kept touch this culture. Yeah, no, it may need to change too. So I thought that?

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Tara Rethore 31:49

Will, the thing. The other thing, too, to remember, if you if you remember, in the roadmap on culture, one of the elements of that one of the pieces of that puzzle is origins. So you don't you need to incorporate like, where you came from. How were you? How did you arrive here, as well? Yeah, your culture. And I think that's, you know, important. I've kind of held up Goldman and Amazon as possibly being behind the times on that. That may or may not be true, there are elements of how they got there that they may need to keep and preserve and want to preserve going forward. So it's not a throw the baby with the bathwater. You know, it is really about reflecting on what you've got. Right? And and what's going to be helpful to take you forward.

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Ginny Bianco-Mathis 32:41

Absolutely. Well, I love this, I love how you broke this up into those three major elements with this overlay of culture. And I feel as a practitioner, as a person out there that is trying to assist leaders and as a leader, myself, I, it makes me feel good to know I have an infrastructure of tools and the power of those questions and those templates to make sure the right discussions happen. So even in the for the leader doesn't take a whole team off track. Every equalizes everyone in the room, quite beautiful. Well, how can people get in touch with you and get that book?

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Tara Rethore 33:33

Well, you can definitely go to Amazon and you can look for charting the course CEO tools to align strategy and operations, you can look under my name, Terra, Thor, and if you just want more information about it tools for CEOs comm will take you to the book page on our website. In addition, you can always email me it's te Rethore at strategy for real calm. And in the website address the four is the number four. And in the tools for ceos.com address, the four is again, the number four. So you can definitely reach out, I'd love to hear what's happening on your particular situation, we can schedule a few minutes to chat about it and happy to talk about it.

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Ginny Bianco-Mathis 34:18

Beautiful niche. Yeah, I'm



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Mitch Simon 34:21

looking at tools for SEO calm, which is just a great place to go to get all of these tools. I'm looking at the book right now and there's really good stuff on you know, we were asking questions about what what do we need to keep what do we need to change? And some really good questions really helped us with that. And I do I'm closing here because I really do appreciate the nature of getting the destination, right. And being open and curious to to look at things that have worked, which just didn't they're not representative of your clinical culture before COVID. And I do think that is where we're trying to define In the new destination, we really have to be open to what's changed. And I do think that for us who do plan strategy, we have to appreciate this change even though we don't like it, you know?

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Ginny Bianco-Mathis 35:14

Well, and one last point, the questions and the templates forced the folks that are having this discussion. It forces them to go beyond. Well, here's what we did before. COVID. Yeah. What I found that's the first place they like to go. Yeah. So these are powerful.

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Mitch Simon 35:34

Great. Well, thank you. Thank you, Tara. And thank you, Ginny, and thank you to our wonderful audience, our listeners. If you've enjoyed this episode, which we have, please share this with your friends and colleagues. And definitely give us a nice five star review. And put your comments in so that we know how to make the show even better. Until next time. Thank you for joining us for another episode of team anywhere