

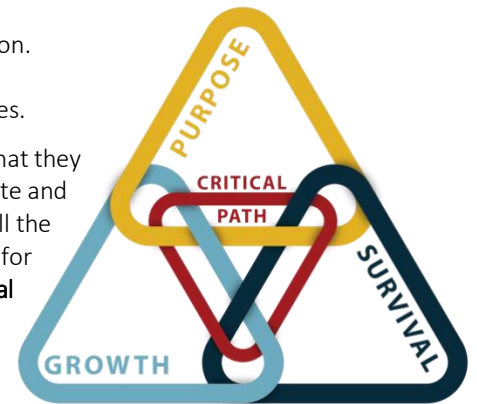
Strategic Planning with Essential Strategy[®]



Essential Strategy is built upon a purpose, growth, and evolution framework. It is based on the philosophy that regardless of type, size or complexity, organizational success lies in three simple truths:

- First an entity must have and pursue a **purpose** defined by vision, values, and contribution.
- Second it must be intentional about the **growth** of the organization and its people.
- Third it must continually adapt and **evolve** to meet the needs and wants of those it serves.

However, it is not enough to simply acknowledge these three truths. Intuitive leaders know that they must achieve a balance of vision, growth, and resilience, but often it is the mechanism to create and sustain that balance that they find elusive. We address this with a fourth element that we call the **Critical Path**. This backbone brings balance and stability to the framework and is the catalyst for driving the kind of intentionality that supports agility and creates lasting value. **Essential Strategy is more than just a planning tool – it is a philosophical approach to organizational excellence that supports the discipline required for agile, sustainable success.**



Project Delivery

We work through four distinct stages when designing and delivering our strategic planning projects. Each stage varies in depth and focus based on the unique needs of the organization. We don't believe in one-size-fits-all, so every project designed is unique to the client.



Discovery focuses on the analysis of the internal capabilities and alignment of leadership around strategy and risk, as well as an external review of drivers and constraints effecting the organization and impacting strategic performance. It is an intelligence gathering process, using tools like SWOT, PEST, 5-Forces, etc., that helps to identify blind spots having the potential to impact strategy.

Alignment sets the tone for the organization by creating a clear picture of the future-state it wants to achieve, weaving mission, values, and history to create a story that resonates with clients and consumers and inspires both employees and stakeholders. Thoughtful visioning defines a cause that is altogether aspirational, participatory, and compelling, inviting all to join the journey – alignment ensures that those connections are made.

Pathfinding is the problem-solving stage where the data gained in Discovery is used to support strategic decisions. When aligned with the outputs of Visioning, it defines strategic imperatives that deliver on purpose, drive growth, and build resilience through ongoing learning and evolution. The Arkhi Link functions to support the setting of priorities, moving organizational focus from entrenchment to adaptation.

Performance is where the plan to execute strategy is created. Realistic and feasible goals, metrics and targets are defined to accomplish the work and achieve intended results. It establishes key performance and risk metrics, communications, and agile reporting to support a living program that is agile and informed, keeping pace with both industry and market.

Product Design

Plan documents are very specific to each client, so we work through a detailed design process to help create the look and feel for a final product that works as intended, whether it be handing off a MSWord version to an in-house team or using our own digital graphic artist. Our goal is for the final product to clearly communicate both vision and plan with a robust system behind it to deliver the results.

Our Sweet Spot

There are a lot of planners and facilitators out there, but when clients reach out to us, it is because they want more than a regurgitated plan from prior years or a canned workshop experience. Typically, there is a problem to be solved – a critical weakness in sustainability, a strategic performance failure, a need to pivot or evolve – and it's urgent. Our ideal client knows their business inside and out. They are looking for fresh, smart perspective. They understand that change is constant, and adaptation is not an option. They are ready to do the work necessary to grow their people, their organization, their vision. These are the projects we take on and the work we choose to invest our time, experience, and expertise in to support the clients who are as passionate about strategy as we are.

Dr. Jessica Black, Fairbanks Native Association Board President

“Working with Erin Sedor of Black Fox Strategy for the past two years has been an amazing experience. She is a skilled facilitator, who can synthesize varied sources of information and input in real-time. Erin produces strong visual and written products, which guides our organization in the form of our strategic plan. We value our partnership with Black Fox Strategy.”



Project Estimation Guide - Strategic Planning



Our Pricing Philosophy

We have a good sense of the time and effort required to produce high-quality facilitation experiences and related tangible deliverables. We work hard to design proposals that are fair to us and cost efficient for our clients. We like to scope our projects on a case-by-case basis to provide the best product and service within the budget allowed, but we understand that sometimes all you need is a ballpark number to get you started. We fixed-price project deliverables to the greatest extent possible, with variable meetings by the hour so our clients have a good expectation of overall cost. Our non-profit (NP) Variable Hourly rate is discounted by more than 15%. This guide is simply that - we will always work to help you bridge cost and budget, so don't hesitate to give us a call.

Project Element	Primary Activities	Primary Deliverables	Variable Hourly	Fixed Fee	Add Your Options	Build an Estimate
Kickoff	Coordination and data capture and document review	Final schedule & objectives Kickoff presentation	N/A	\$1,250	N/A	\$1,250
Discovery & Prep	Core SPA Survey ¹ deployment & analysis	Survey Summary	N/A	\$2,500	N/A	\$2,500
In-Depth Discovery & Prep	Customized SPA Survey and/or Interviews with Board/Leadership	SPA Customization average 10 hours; Interviews run 15-30 minutes each	\$385 or \$325 NP	N/A	_____ Hours	
Workshops	Discovery, Alignment, Pathfinding and/or Performance	Facilitation plan & materials <i>6-8 hour sessions</i>	Day 1	\$3,600	N/A	\$3,600
			Day 2+	\$2,600	_____ Days	
Workshop Summary	Single report recap of all workshop outcomes with recommendations	Workshop Summary with Notes & Boards	N/A	Option 1 \$3,200	Option 1 or Option 2	
Strategic Plan Design	Drafting, design, review, and presentation of final plan document	Strategic Plan <i>Includes Workshop Summary</i>	N/A	Option 2 \$7,500		
Client Meetings	As required (typical estimate is 4 - 10 hours)	N/A	\$385 or \$325 NP	N/A	_____ Hours	
Expenses	Airfare, hotel, transportation invoiced as incurred and at cost		At cost	N/A		
Your Core Project Subtotal						
Deposit	25% due on contract signing to lock dates; credited toward final invoice			25%		
Cancellation Fee	15% cancellation fee (deducted from deposit) if canceled by client and not rescheduled and completed within 12 months			15%		

Things we will never bill you for:

Travel Time	We do not charge for travel time regardless of location – you pay for actual time worked or on site	Included
Phone calls & Email	We want you to call us, so we don't nickel and dime our clients for email or phone calls	Included
Supplies & Materials	Our workshop rate includes all supplies and materials required to deliver an engaging, fun, and productive workshop	Included
Support Services	We have a team of professionals that support our proofing, graphic design, and survey customization but you will never see a bill – our fixed and variable rates are all-inclusive	Included
Mark Ups	We never mark up our expenses – we invoice actual cost for reasonable business expenses approved by our clients	Included

¹ The Strategic Performance Alignment (SPA) Survey is a proprietary tool we created for discovery and workshop planning that allows us to collect meaningful data in the most efficient way possible. Our clients love this piece as reveals where the leadership team is aligned and where gaps exist.

