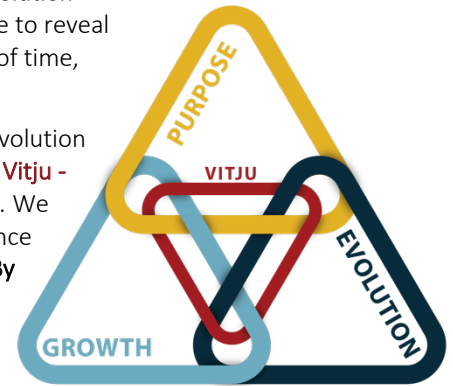


# Strategic Planning with Essential Strategy®



**Essential Strategy** is a simplified approach for integrating strategy, risk, and resilience capabilities to improve organizational performance and long-term sustainability. It is built on a **purpose, growth & evolution** framework that brings clarity and focus by using the nexus where these three things converge to reveal critical strategic risks, gaps, and weaknesses. This allows for a more intentional prioritization of time, energy, and resources towards those things that are mission-critical.

To create equilibrium, we need an element operating within the purpose/growth/evolution foundation to serve as a catalyst for strategic focus and operational excellence. **We call it the Vitju - the vital juncture.** Vitju is the space where purpose, growth & evolution imperatives overlap. We use the **Vitju** as the mechanism to identify critical priorities, creating alignment and balance between delivering on mission, pursuing growth, and planning for long-term sustainability. **By using the purpose, growth & evolution as foundational cornerstones for designing strategy, and then using Vitju as the mechanism to reveal critical risks, we more clearly prioritize time, energy, and resources.** This is the approach we take, and it is complimentary and can easily layer into other strategic planning frameworks already in place.



## 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 affecting 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 the 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 Word version to your in-house team or using our own digital graphic artist. Our goal is for the final product to clearly communicate both your vision and plan with a robust program 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 a 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 <sup>1</sup> deployment & analysis	Survey Summary	N/A	\$2,500	N/A	\$2,500
In-Depth Discovery & Prep	Customized SPA Survey & Analysis, and/or Interviews	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	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		
<b>Your Core Project Subtotal</b>						
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%		
Large Groups	Workshops planned for more than 35 people – community, council, advocate, industry sessions – may require an additional resource at an addition cost (unless supplied by the client)					

### 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

<sup>1</sup> 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.

