

# Strategic Pivot Meeting

## Facilitator's Guide

Use this meeting to create new near-term strategy when a big change in the market means your existing strategy won't work.

### Purpose:

To decide on a new strategy your organization can use to survive and thrive

### Expected Outcomes:

- A shared understanding of what changed and what the new strategy needs to accomplish
- Insights into leading indicators that inform your new strategy
- A new list of strategic priorities
- A near-term action plan
- Ideas about other things you could try if this plan doesn't work
- Commitment to the new plan



## Process

1. Greetings and Goals
  2. Situation Briefing: What's real right now?
  3. Predictions: What do the indicators suggest about our future?
- Break -
4. Revenue: How can we keep money coming in?
  5. Expenses: How and where can we save money?
  6. Resilience: How can we keep our operations running?
- Big Break -
7. Reconvene: What else? (and a process reminder)
  8. Quick wins: What's easy that we should just do?
  9. Top Priorities: Which projects should we prioritize right now?
- Break -
10. Plan Next Steps: Who will do what by when?
  11. Closing: Review and Appreciations

## Timing

Most teams will need **four to six hours** to work through the discussions on this list. You'll also want to build in several longer breaks to give people time to refresh themselves and think quietly before jumping to the next step.

We recommend **blocking out either one full day** for this discussion or breaking it into **two separate meetings**.

## Step-by-Step Instructions

### Before the Meeting

<b>Schedule and Send Invitations</b>	<b>1 to 10 days in advance</b> Everyone needs time to prepare, but not so much time that the situation will have changed.
<b>Preparation Instructions for Participants</b>	<b>Select and share a <i>future indicator</i> and brainstorm ideas for the three <i>How Can We</i> questions.</b> Send all participants the Preparation Worksheet to complete on their own before the meeting.

### Instructions

Your team will get much better results when they come to this meeting prepared.

In addition to sending invitations and the pre-work listed above, you need to:

#### **Prepare a brief situation update.**

For example, you might want to share the latest reports on revenue, pipeline, production challenges, scheduling changes, market shifts, or any other significant changes in your operating environment.

If your team isn't already well-informed about the current situation coming into this meeting, plan time to catch them up in advance. Make sure to share reports and talk with team members individually before the meeting. You want everyone to have a good understanding of what's going on so they can make well-informed decisions in this meeting.

#### **Clarify the decision-making process the group will use.**

After discussing many options, your group will decide on new priorities and create an action plan. Make sure you know how those decisions will get made.

For example, some groups vote to finalize decisions. Others may try to find a natural agreement, then expect the most senior leader to take responsibility for the final decisions.

Come prepared to confirm the decision-making process at the beginning of the meeting.

## During the Meeting

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### 1. Greetings and Goals

Purpose of this Topic	Open the meeting and get everyone actively involved
Expected Outcomes	<ul style="list-style-type: none"><li>• Everyone understands why they're there and what you're trying to accomplish together</li><li>• Everyone knows how the rest of the group is doing today</li></ul>
Estimated Duration	15 minutes

#### Instructions

**1. Greet everyone** and quickly share the goals for the day. For example, you might say:

“Thank you all for coming and for committing to spend this time together.

As you know, the future of our business is at stake. It's up to us to find a path forward that will help us come out of this unexpected situation both stronger and more resilient than ever. We have a lot to work through and hard decisions to make, but I know with your expertise, your wisdom, and our commitment to stay focused, we can do this. By the end of the day, we'll have identified quick wins we can act on now and a set of new priority initiatives we can begin.”

**2. Run a quick check-in round** to get everyone involved and get out any issues that could get in the way of your meeting.

**3. Review the schedule** and confirm the decision-making process.

#### Recommended Check-in: Temperature Check and Commit

Ask everyone to share:

1. How they're feeling on a scale of 1 (nearly dead) to 10 (super awesome).
2. Why they chose that number, in one or two sentences.
3. Anything that might interfere with their ability to stay focused for the day.
4. Their commitment to doing the work in the meeting.

An example check-in might sound like this:

“I'm a 6 today. My health and family are good, but this situation has been keeping me up at night and I'm worried about how we'll handle it. I've blocked the whole day for this meeting, so I should be able to fully participate except if I get a call from my mom, which I'll need to step out and take. Now, I'm in.”

See also: [Core Protocols Check-In](#)

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## 2. Situation Briefing: What's real right now? (5 - 10 min)

Purpose of this Topic	Make sure everyone knows the latest facts about your situation
Expected Outcomes	<ul style="list-style-type: none"><li>• Everyone has the same information</li></ul>
Estimated Duration	5 - 10 minutes

### Instructions

Keep this briefing very short. Re-confirm the key events leading up to this meeting and how these events impacted your business metrics, then ask if anyone has questions.

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## 3. Predictions: What do the indicators suggest about our future?

Purpose of this Topic	Gain shared perspective on your best guesses about the future
Expected Outcomes	<ul style="list-style-type: none"><li>• More diverse information about the current events and future predictions</li><li>• A shared perspective around two or three likely future scenarios that should shape your plan</li></ul>
Estimated Duration	40 minutes

### Instructions

If they haven't already, ask everyone to post the indicator they selected where your group can see it.

Then, look at each indicator and discuss what you believe it suggests about your organization's future.

This is an opportunity for your team to have a rich discussion about what the future might look like for your part of the world, and to try and make some sense out of all the disparate information you're hearing.

*This discussion is optional*, as it has the potential to run long. That said, if you skip this exercise entirely, expect to hear a lot of comments that start with "Ok, but what about...?" or "I heard that..." that may take your group repeatedly off-track throughout the rest of the meeting. If you are pressed for time, consider running this conversation as a separate pre-meeting rather than skipping it entirely.

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## Take a Break!

Give everyone some time to refresh themselves and digest everything you've discussed before continuing. 15 minutes minimum.

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## 4. Revenue: How can we keep money coming in?

Purpose of this Topic	Create and discuss several ways you could build revenue
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<b>Expected Outcomes</b>	<ul style="list-style-type: none"><li>• A list of options for building revenue</li><li>• A shared understanding about how each option might work</li></ul>
<b>Estimated Duration</b>	40 minutes

## Instructions

Now you and your team will discuss all the ideas you brainstormed before the meeting, starting with ways to build revenue.

First, explain the process to the group.

### Steps:

1. One person shares the top 3 ideas on their list, explaining each one very briefly.
2. Going around the group, each person adds their top 3 ideas to the list. If they don't have any ideas that haven't already been mentioned, they can pass.
3. After everyone shares their ideas, discuss these ideas as a group.

As people share their ideas, encourage the group to ask questions that help them understand the idea better, but don't debate the pros and cons until after everyone has a turn to add their ideas.

When you have the whole list in front of you, focus the discussion on how each idea might work, but don't let the group get swept up into a lot of detail. You can go into all the detail after you've looked at all your options and picked a few to prioritize.

**Watch the time.** After 35 minutes, let the group know that you will be moving to the next topic in five minutes, so they need to wrap up the discussion. Move to the next topic after 40 minutes, or when the group feels that they understand the ideas, whichever comes first.

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## 5. Expenses: How and where can we save money?

Purpose of this Topic	Create and discuss several ways you could save money
Expected Outcomes	<ul style="list-style-type: none"><li>• A list of ways to cut expenses</li><li>• A shared understanding about how each option might work</li></ul>
Estimated Duration	30 minutes

### Instructions

Share your ideas for reducing expenses using the same process you used for the last topic. You'll go a little faster this time, since you've been through the process once already.

**Watch the time.** After 25 minutes, let the group know that you will be moving to the next topic in five minutes, so they need to wrap up the discussion. Move to the next topic after 30 minutes, or when the group feels that they understand the ideas, whichever comes first.

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## 6. Resilience: How can we keep our operations running?

Purpose of this Topic	Create and discuss ideas for keeping the business running
Expected Outcomes	<ul style="list-style-type: none"><li>• A list of things you could do to maintain operations</li><li>• A shared understanding about how each option might work</li></ul>
Estimated Duration	30 minutes

### Instructions

Share your ideas for maintaining operations using the same process you used for the last two topics.

**Watch the time.** After 25 minutes, let the group know that you will be moving to the next topic in five minutes, so they need to wrap up the discussion. Move to the next topic after 30 minutes, or when the group feels that they understand the ideas, whichever comes first.

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## Take a LONG Break!

Either take a meal break, or break for the day and come back to this tomorrow.

At this point, your group has shared a lot of ideas and "what if" possibilities for your future. Before you make decisions about what you'll do, everyone needs time to consider what they've heard.

At a minimum, encourage the group to eat, take a walk outside, and do a bit of independent thinking. If you can schedule this meeting over two days and come back after sleeping on what you've discussed so far, that's even better.

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## 7. Reconvene: What else? (and a process reminder)

<b>Purpose of this Topic</b>	Get everyone re-engaged in the meeting and capture any insights they've had over the break
<b>Expected Outcomes</b>	<ul style="list-style-type: none"><li>• Everyone is engaged and has the full list at the top of their mind</li><li>• A list of any new ideas or insights</li></ul>
<b>Estimated Duration</b>	10 - 30 minutes

### Instructions

Welcome everyone back. Then, share the full list of all the ideas the group shared so far.

### Then, ask the group: What else?

What other ideas came to them over the break? What insights did they have? What new questions came up? You held a long break to make sure everyone had time to consider the discussion and develop new insights.

Take this time to reconnect with the work you've done thus far and to capture those new ideas.

### Before moving to the next topic, remind everyone about your decision-making process.

So far, you've worked to create some predictions for the future and a list of possible ways you can take action. Now, it's time to make some decisions. To ensure everyone can calmly engage in these critical discussions, it's important to make sure the decision-making process (including how you'll resolve any disagreements) is clear.

Once everyone understands and agrees to this process, move to the next topic.

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## 8. Quick wins: What's easy that we should just do?

<b>Purpose of this Topic</b>	Identify the no-brainer actions your group should take now
<b>Expected Outcomes</b>	<ul style="list-style-type: none"> <li>• A list of quick wins</li> </ul>
<b>Estimated Duration</b>	15 minutes

### Instructions

Some of the ideas your group shared are obvious and easy. That's fabulous! Identify these so you don't have to spend precious meeting time talking about them now.

### Steps

1. Give everyone a way to identify items in the list. (see *list voting options* on the last page)
2. Ask everyone to silently mark the ideas they believe to be "quick wins," all at once.
3. Once everyone has finished marking ideas on the list, discuss and resolve any disagreements.

This should go very quickly. Any long discussions mean that the so-called "quick win" isn't obvious to everyone.

Once the obvious quick wins have been identified, move to the next topic.

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## 9. Top Priorities: Which projects should we prioritize right now?

<b>Purpose of this Topic</b>	Identify the top priority ideas your group will put into action
<b>Expected Outcomes</b>	<ul style="list-style-type: none"> <li>• A list of top priority actions</li> <li>• Group commitment to these ideas</li> </ul>
<b>Estimated Duration</b>	40 minutes

### Instructions

Set aside the quick wins you've identified, and look at the options that remain on your list.

Discuss which ones make the best use of your organization's unique strengths and market position, and which have the best chance of leading to a stronger future.

Then, using your organization's decision-making process, decide on the options you'll prioritize and act on first.

(Not sure how to make these decisions? See the recommended *decision-making criteria* on the last page)



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## 10. Create an Action Plan

<b>Purpose of this Topic</b>	Create a plan for what happens next
<b>Expected Outcomes</b>	<ul style="list-style-type: none"><li>• A list of action items</li><li>• Commitment to completing these actions</li><li>• A date for your next meeting</li></ul>
<b>Estimated Duration</b>	20 minutes

Create an action plan for putting your new priorities into action.

Your action plan should include:

- Action items detailing one or two immediate next steps for every Quick Win and New Priority identified during the meeting. Each action item should include the directly responsible individual who will ensure it gets done and an expected completion date
- A plan for communicating this new strategy to everyone who will be impacted by the decisions you've made.
- The date and time when the group will meet to review progress.

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## 11. Closing: Review and Appreciations

<b>Purpose of this Topic</b>	Confirm results and celebrate what we've achieved
<b>Expected Outcomes</b>	<ul style="list-style-type: none"><li>• Confirmation that the written record accurately reflects the group's decisions</li><li>• Acknowledgement and appreciation for all the hard work</li></ul>
<b>Estimated Duration</b>	15 minutes

That was a lot of work! Review everything you've accomplished by checking that:

- The communication plan for reporting out is complete and accurate
- Every decision is fully documented
- Action items have clear descriptions, individual owners, and due dates when the group will check progress
- Everyone knows when they can expect to hold After Action Reviews and status update meetings to evaluate your results

Then, thank everyone for their time and effort to create the best possible plan in this high-pressure situation.

## Useful References

### Technology for Running this Meeting

You will find a copy of this template built into the Lucid Meetings platform.

Lucid Meetings makes it easy to send invitations, collaborate on the agenda, keep track of time, capture insights, and document your action plan. You may also need [audio or video conferencing software](#).

### How to share and vote on options

You will need a way for the group to write down options, then work with those options to find the quick wins and priorities. To keep this simple, we recommend collaborating using one of the following:

1. Flip charts, white boards, and sticky notes when meeting in person.
2. A [collaborative online document](#), such as a Google Doc.  
Upload the “Collaborative Doc” template included with this guide to get started.
3. Group note taking in Lucid Meetings. You’ll see instructions in the online template.

### Decision-Making Criteria

At Lucid, we use research-backed evaluation criteria when facing a difficult, high-stakes decision.

If you get stuck when comparing strategic options with your team, ask them to consider these questions for each one:

#### Facts

- What are the facts? (Costs, size, who’s involved, timeline, etc.)

#### Forecast

- What would it take for this option to work out? What needs to go just right?
- What could happen to make this totally fail?

#### Experience

- If this option worked out, what would we be celebrating a year from now?
- If this goes badly, what happens to us?

#### Ethics

- If this works out, what does it do to our community?
- What happens to our community if this fails?

Learn more about these criteria and download a spreadsheet that makes it easier to compare options here: [How to Establish and Effective Decision Making Process](#)

**Credits:** Lucid Meetings would like to thank Angelique Rewers at The Corporate Agent. Angelique inspired this template by posting the three “*How can we*” questions and examples for her private Velocity community, then graciously granted us permission to share these questions and examples with you. Thank you, Corporate Agent!

You can find more excellent resources from The Corporate Agent on their website:  
[www.TheCorporateAgent.com/influence](http://www.TheCorporateAgent.com/influence)