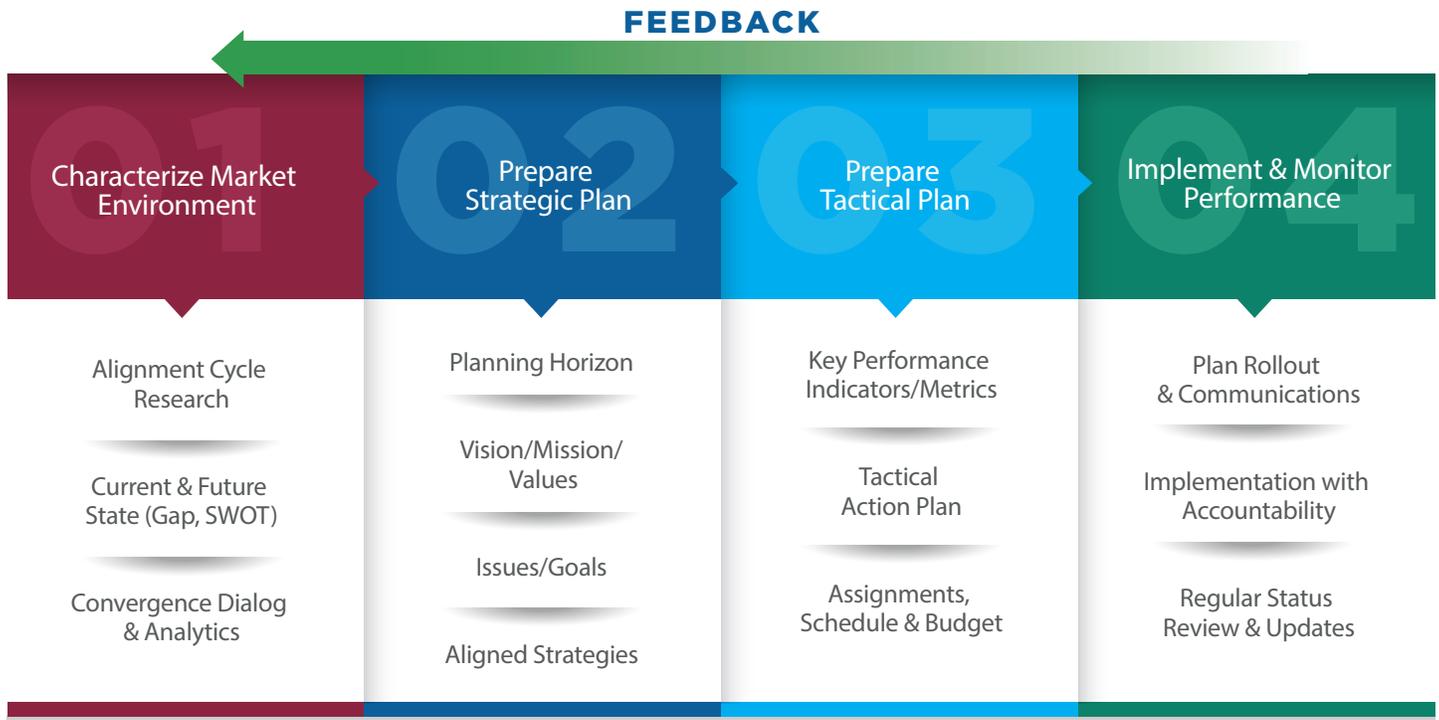


STRATEGIC PLANNING USING 21ST CENTURY TECHNOLOGY

Based on years of strategic planning experience and leveraging a proven process, Excergy provides a clear strategic framework, issue prioritization, and broad direction. We also support the development of strategies and tactics to achieve the desired outcomes.



ALIGNMENT OPTIMIZATION DELIVERY

Experience shows that having a clear and unified vision from the outset greatly enhances the successful implementation of a strategic planning project. Research confirms that this requires aligning the organization along four important parameters:

- 1 Alignment on **vision and overarching goals**
- 2 Understanding of **unintended consequences, barriers and risks**
- 3 Agreement on **assumptions about the current state**—drivers for future plans
- 4 Definition of **metrics**—how success is measured

We use proprietary SchellingPoint software based on Nobel Prize-winning work on how individuals and teams make effective decisions and take coordinated action. This technology-enabled consulting methodology—combined with traditional consulting and facilitated workshops—creates both a unified vision and a powerful drive toward effective implementation.

Alignment Optimization includes gathering inputs from an unlimited number of stakeholders. The resulting responses and analysis are used as the basis for focused workshops with a core planning team that has the advantage of starting with critical organization-wide—and, if desired, external—input.

INTERVIEWS AND OPINION SURVEY

The SchellingPoint software empowered with our standard strategic planning interview template is used to conduct telephone and online interviews. Information gathered in these interviews—combined with our deep industry expertise—is the basis for customizing the opinion survey. This opinion survey is distributed via email to any number of stakeholders. Once participants respond to the opinion survey, we conduct an online convergence dialog where participants provide additional thoughts and reasoning. In effect, we conduct virtual workshops as an input to the core team planning sessions. Topics covered in this work will include the vision, mission, and values of the organization, organizational strengths and weaknesses, and external opportunities and threats. Additional topics typically include organizational priorities such as:

- Asset Management
- Customer Service
- Employees
- Finance
- Operations
- Technology
- Regulatory Compliance
- Sustainability and Environmental Protection

Excergy analyzes the results of the opinion survey to provide insights that are simply not possible using traditional consulting techniques alone. This process results in **data-driven understanding** that provides the following benefits:

More Involvement in Less Time

Broader engagement and more productive workshops

Clearer Input & More Complete Outcomes

More accurate and forthright inputs resulting in data-driven direction

Support Change Necessary to Drive Implementation

Minimizes internal resistance and predisposes team to success



COORDINATED ACTION

Getting groups from
"We each think this" to
"We all agree to do that"

WORKSHOPS

Excergy facilitates a series of workshops designed to develop your utility's strategic direction, the key issues facing it, and the strategies and tactics needed to address them. Excergy provides a template for the development of the tactical action plan, supporting identification of Strategy and Tactic Leads, prioritization, budgets, milestones, timeline, and overview of benefits.

Additionally, Excergy facilitates the development of performance measures and identification of focused Key Performance Indicators (KPIs) for each Issue. Developing and identifying true KPIs that concisely communicate and measure how effectively your utility is addressing each Issue improves implementation. It also enables these overarching KPIs to be tailored and cascaded to all levels within the organization and to each staff position. This supports the employee's ability to connect their work to the Plan and to develop an understanding of how their day-to-day job responsibilities impact your utility's Strategic Plan elements and performance.

STRATEGIC PLAN & PRESENTATIONS

Based on the Alignment work and workshops conducted, Excergy develops a written Strategic Plan and related presentations to key internal and external stakeholder groups. The Plan contains a summary of activities conducted during the planning process and feedback from governing bodies; it also serves as a clear Implementation framework for your utility to follow in the coming years.

For more information, please contact Lynn Adams at ladams@excergy.com