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# Strategy Reality Check

Step-by-step guide to check if  
the strategy is delivering real results  
and to course-correct fast.



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# Introduction

Leadership teams invest time crafting bold strategies, aligning on purpose, and signing off big initiatives. But some drop the ball when it comes to checking if these initiatives deliver the desired results.

Most leadership teams are running too fast to stop and look around.

*“What signals are telling us we’re on track with our strategy goals?”*

*“And which ones are telling us we’re not?”*

Even worse: many don’t have real data on what their initiatives are actually delivering. The real question is *“How can you course correct when you don’t know where you are?”*

This is where the ***Strategy Reality Check Workshop*** comes in!

Peter Drucker said - *“What gets measured gets managed.”*

Great leadership teams make time for a reset.

They pause.

Check the compass.

Adjust.

At least every quarter. Sometimes more.

That’s exactly what this 2,5 hours workshop helps you do. It’s fast, focused and brutally effective.

I’ve summarized my experience in this step-by-step guide so you can run this workshop too! Or you can always bring me in to lead it with you.

Let’s get into it!

# Outcomes Of The Workshop

By the end of the workshop your leadership team will have:

- Insight into the key forces propelling and blocking strategic progress.
- A list of main challenges that need resolution.
- Concrete ideas to address those challenges.
- Actionable tasks with dates, milestones, and owners to get back on track.

# Before We Start

This workshop is designed for in-person sessions, which I've found to be the most effective format for leadership work. However, if meeting in person isn't possible, the structure and materials in this guide can easily be adapted for online collaboration tools like Miro.

## **Time Required:**

Approximately 2,5-3 hours.

## **Ideal Group Size:**

4–6 participants. Larger groups may require more time. The instructions in this guide are based on a group size of 5 participants.

## **Materials:**

- Sharpies or other pens (black is best for visibility).
- Post-its in different sizes and colors.
- Voting dots in different sizes and colors.
- Timer (any type of time keeping device).
- Whiteboard, flipchart, or empty wall space (Miro or other digital workspaces for remote workshops).

## **Breaks:**

Include two 10-minute breaks. Read the group's energy and offer more if needed.

## **Choose a Decider:**

Before you begin, assign a Decider, typically a team lead or key stakeholder. Their role isn't to micromanage, but to make final calls when needed and keep the group moving forward.

## **Ground Rules:**

Setting ground rules helps create focus, safety, and shared expectations. They keep the energy productive and help prevent unhelpful dynamics like talking over each other or going off-topic. Keep it simple and name the rules out loud. This gives you permission to refer back to them later if needed.

## **Example ground rules:**

- One voice at a time
- Phones and laptops away (unless needed for the session)
- Stay on topic
- All ideas welcome, judgment-free zone

# Start the Session

At the start, welcome the group and take them through the agenda. Create a focused and positive tone, align the group on the purpose of the session, and set clear expectations for the agenda and outcomes.



**Time:** 5 minutes



## **Materials:**

- Slide or flipchart with the workshop agenda
- Ground rules visibly displayed (on a flipchart)



## **Instructions**

### **1. Welcome participants**

- Thank everyone for being there and acknowledge the value of their time.
- Say something like: *“Today we’re stepping back to see if the strategy is delivering real results, and to identify what we need to shift or strengthen to keep moving forward.”*

### **2. Walk through the agenda**

- Briefly explain what is coming: *“We’ll look at the successes, surface blockers, explore solutions, prioritize the most promising ones, and assign clear ownership for next steps.”*

### **3. Clarify the end goal**

- Emphasise that by the end of the session the team will have:
  - A clear picture of what is working and what are the blockers for delivering the strategy objectives.
  - An action plan to remove the key blockers.
  - A realistic timeline and owners for each step of the action plan.

### **4. Walk the group through the Ground Rules**

- Explain why they matter.

# Opening / Ice Breaker

## Goal

Create engagement and focus at the start of the workshop.

## Time: approximately 5 minutes

- 1 minute silent reflection and post-it writing.
- 30 seconds per person to stick the post-it on the wall and share in the group.

## Materials:

- Post-its
- Sharpies
- Whiteboard/flipchart/empty wall space for post-it parking.

## Instructions

After welcoming the group, start with a quick check-in to shift everyone into workshop mode. This is key!

Ask the participants to grab a post-it and a pen and finish one of these quick engagement prompts:

**Option 1:** Anticipation Check – *“I’m here today because...”*

**Option 2:** Set-the-Stage Sentiment – *“Today’s session will be a win for me if...”*

Or

**Option 3:** Strategy Reality Emoji – Draw *“One emoji to describe your relationship with the Strategy goals right now.”*

## Pro Tip

The check-in you choose depends on the group. If there are new team members among the participants, consider extending the session by 30 minutes and start with a bonding activity.

# Refresh the Strategic Goals and Key Results

## **Goal**

Get everyone on the same page about the goals and key results in scope for today's workshop.

 **Time:** approximately 3 minutes

## **Materials:**

- A flipchart/wall space with the strategy goals and key results that the group will be reviewing.

## **Instructions**

Walk the group briefly through the strategy goals and expected results they have agreed on previously and will be evaluating (e.g. annual, quarterly or 2-year strategic goals and key results). Or invite one of the participants to do it.

Don't open the floor for debate, just align on the facts.

## **Pro Tip**

To save time, prepare a summary of the goals and key results on a flipchart or wall beforehand.

## **Note:**

Not all teams have clearly defined key results to measure success. But without them, it's hard to know what "success" looks like and teams risk chasing short-term wins without a clear destination. Check in with the group beforehand to understand what goals or metrics they've aligned on, so you can prepare the right materials for the workshop.

# Sailboat

## 🎯 Goal

Assess what's helping or hindering the realization of the strategic goals by looking back and identifying key drivers (winds) and obstacles (anchors).

🕒 **Time:** approximately 25 minutes + 10 minutes slack for light discussion.

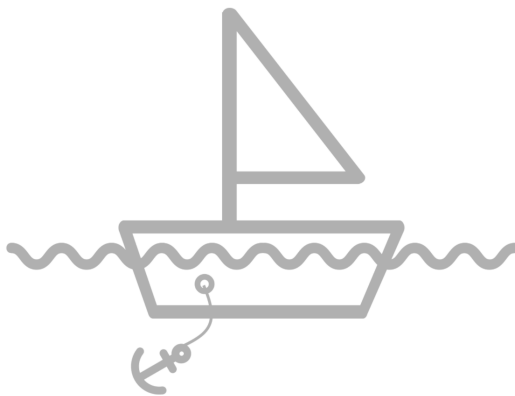
## 📦 Materials:

- Post-its in 2 colors
- Sharpies
- Sailboat sketch on flipchart or whiteboard

## Preparation Before the Session

Draw a simple sailboat on a flipchart or white board. Include:

- A boat with a sail (above the water).
- A visible waterline.
- An anchor below the surface.



## 💡 Instructions

The Sailboat activity is a visual way to explore how your team is progressing toward the strategic goals.

Explain the sailboat metaphor to the participants:

*“The sailboat represents your team moving toward the strategic destination. The wind pushes you forward. These are the things that help you make progress. The anchors weigh you down. These are the things that slow you down, block momentum, or create drag.”*

**Part 1: Winds (max. 10 minutes)**

Ask the participants to take 3 minutes for silent reflection on these questions:

*“What’s helping us move toward our strategic goals? What signs show we’re making progress?”*

Each participant writes 3–6 post-its (one idea per note). Encourage examples based on real data or observable progress, not just gut feeling.

Sharing:

- In turn, the participants place their post-its above the waterline (the wind in the sail) and read each note aloud briefly. No discussion or debate at this point. This surfaces signals of momentum and success. Don’t analyze, just observe.

**Part 2: Anchors (max. 10 minutes)**

Ask the participants to take 3 minutes for silent reflection on these questions:

*“Where are we stuck or struggling? What’s slowing us down or dragging us off course?”*

Each participant writes 3–6 post-its (different color post-its than the first round).

Sharing:

- In turn, the participants place their post-its below the waterline (the anchors dragging the boat).
- Participants briefly read them out. Again, no deep discussion yet.

This identifies internal or external blockers that stand in the way of progress.

**Pro Tips**

- Encourage participants to reference specific results or indicators.
- To save time, ask the participants to pay attention to similar input and group post-its as they go. At the end of the activity, you’ll have clusters obstacles already.
- Plan 10 minutes for light discussion. After both rounds, take a moment for brief reactions or clarifying questions. Don’t let this become a full debate, just enough to sharpen shared understanding.

# Prioritize Obstacles. Decide What To Focus On

## Goal

Narrow down the list of obstacles (anchors) to identify the 1–2 most critical ones. These will be the ones the team focuses on and turns into concrete actions.

 **Time:** Approximately 10-15 minutes

## Materials:

- 3 small voting dots per person (e.g. red)
- 1–2 large voting dots for the Decider (e.g. blue or green)

## Instructions

Now that the team has identified what obstacles are dragging the strategy down (the anchors), it's time to create focus. This activity helps the group collectively spot which anchors are most critical and gives the Decider a simple, structured way to choose where to take action first.

This happens in two steps:

1. Heatmap Vote – all participants (except the Decider) highlight which anchors matter most.
2. Decider Vote – the final call on which ones to tackle.

### **Step 1:** Heatmap Vote (3 minutes)

Ask the group:

*“Which of these anchors are absolutely blocking the success of our strategic goals and must be resolved?”*

- Hand out 3 small voting dots to each participant and ask them to take max 2 minutes to look through the anchors and place their dots silently next to the anchors they believe are most critical.
- No voting rules: participants can place all dots on one anchor, spread them out, or vote for their own input).
- Once all votes are in, briefly walk the group through the most-voted anchors.

Note: This is not yet a decision, just a visual scan of where the collective concern is.

## **Step 2:** Decider Vote (5 minutes)

Now it's time for the Decider to make a call.

- Remind the group that the Decider was selected at the start of the session to help move things forward.
- Hand the Decider 2 large voting dots.
- Ask him/her to select max 2 anchors (1 is even better for the focus) that the team will focus on resolving through concrete actions.

These selected anchors will shape the next activity: generating targeted solutions.

### **Pro Tips**

- Offer the Decider a quick consultation moment (max 5 minutes) before voting to clarify questions, confirm assumptions, or hear strong perspectives from the group.
- Announce the timebox clearly: *“You’ve got 5 minutes to consult the group, then we’ll lock in your vote.”*

# Generate and Choose Ideas For Removing The Anchors

## Goal

Generate and select actionable ideas to solve the anchors prioritized in the previous activity.

## Time: approximately 30 minutes (per anchor)

- 5 minutes to explain the template
- 10 minutes for individual work
- 1 minutes per person to present
- 10 minutes for voting

## Materials:

- Idea Canvas templates (on paper)
- Post-its
- Sharpies
- Voting Dots

## Preparation Before the Session

- Create the Idea Canvas before the workshop. Use flipcharts or print it on paper.

## Instructions

This is the first step in solving the selected anchor(s). Participants will each suggest one or more solutions per anchor using a simple canvas.

| IDEA CANVAS    |                                                                       |
|----------------|-----------------------------------------------------------------------|
| TITLE          |                                                                       |
| WHY IT MATTERS | HYPOTHESIS<br><small>If we [do this], then [this will happen]</small> |

### 1. Explain the Idea Canvas

Each participant will brainstorm ideas using the Canvas:

- **Title** – Name your idea in a memorable way.
- **Why it matters** – Three bullet points on why this will resolve the anchor.
- **Hypothesis** – Write: “If we [do this], then [this will happen].”

### 2. Give 10 minutes of silent idea brainstorm

- Encourage participants to create more than 1 idea for each anchor.

### 3. Pitching the ideas

Each participant presents their idea(s) in 1 minute. No judgment or feedback at this point, just listening.

### Pro Tips

- Encourage both bold and practical ideas.
- Play background music to maintain energy.

## Choose what to focus on

### 1. Individual Vote (approximately 5 minutes)

- Give the participants (except the Decider) one voting dot with their initials on it.
- Ask: *"Which idea seems most impactful and promising to implement? Place the dot on the most all-encompassing one from your own, individual perspective."*
- The participants place their vote next to the idea they choose.
- Give each participant 30 sec. to briefly explain why they choose the specific action flow.

### 2. Decider Vote (5 minutes)

- Now it is time to make the final vote.
- Give the Decider multiple voting dots.
- He/she can decide to choose a specific flow or choose tasks from other flows to add to the final flow.
- Allow 2 min. discussion if needed.

# Task Flow

## Goal

Create a step-by-step flow of what needs to happen to implement the voted idea(s).

 **Time:** 15 minutes per flow.

## Materials:

- Post-its
- 1 voting dot per person
- Voting dots for the Decider
- Whiteboard or blank space

## Preparation Before the Session

Prepare a task flow for every participant on a whiteboard or a wall space beforehand. Place the voted idea on a large post-it or write it on the whiteboard. It should look something like this:

<TITLE VOTED IDEA>

|                     |  |  |  |  |  |  |  |  |
|---------------------|--|--|--|--|--|--|--|--|
| NAME<br>participant |  |  |  |  |  |  |  |  |
| NAME<br>participant |  |  |  |  |  |  |  |  |
| NAME<br>participant |  |  |  |  |  |  |  |  |
| NAME<br>participant |  |  |  |  |  |  |  |  |
| NAME<br>participant |  |  |  |  |  |  |  |  |

## Instructions

With this activity the participants will figure out what the involved steps are to make the voted ideas happen.

Ask the participants: *“What is every single step involved in making this happen? Start with the first step in the task flow, and then fill in the final step, before you identify the steps in between. Place the post-its in a sequence.”*

Give the participants 5 minutes for silent writing. When time is up, ask them to place the post-its on the whiteboard/wall in a horizontal row with their name.

### Choose the best idea

#### 3. Individual Vote (approximately 5 minutes)

- When everyone is done, give the participants 2 minutes to look through everyone's input.
- Give the participants (except the Decider) one voting dot with their initials on it.
- Ask: *“Which task flow seems to be the most all-encompassing one? Place the dot on the most all-encompassing one from your own, individual perspective.”*
- Give each participant 30 sec. to briefly explain why they chose the specific action flow.

#### 4. Decider Vote (5 minutes)

- Now it is time to make the final vote.
- Give the Decider multiple voting dots.
- He/she can decide to choose a specific flow or choose tasks from other flows to add to the final flow.
- Allow 2 minutes discussion if needed.

**Note:** if the decider has chosen 2 ideas, repeat the above steps for both flows.

# Set Timeline and Assign Ownership

## Goal

Turn the task flow into an actionable plan with dates and owners. By the end of this step, the team will have clear deadlines and accountability for each task.

 **Time:** approximately 15 minutes per flow.

## Materials:

- Selected Task flow(s)
- Markers
- Whiteboard, flipchart, empty wall space

## Instructions

Ideas are worth nothing unless they are executed! The participants will now create a plan of action for making it happen. It is important to leave the session with committed actions and clear accountabilities.

- Ask the group to set a date for the first step and the last step in the task flow.
- Then ask them to identify key milestones in between.
- Write the dates directly under the tasks.
- Lastly, ask the participants to voluntarily assign themselves to the tasks.
- Explain that assigning a task means that the accountability for making it happen lies with that person.
- Everyone will take their initialed dot and start assigning themselves to tasks that align with their expertise/available time.
- Repeat the steps if the group has selected more than 1 task flow.

## **Final Review**

The participants have done a great job mapping, sequencing, and assigning tasks! Before you go to the last step of the workshop ask the group:

- Is the timeline still realistic?
- Does anyone need support?
- Does everyone know what to do next?

Once the team confirms alignment, you've got an actionable execution plan to get the strategy goals back on track.

# Closing Activity

## Goal:

End the workshop with clarity, energy, and shared commitment. A strong closing moment helps the group:

- Reflect on the work they've done
- Appreciate what they've achieved together
- Strengthen ownership of the next steps
- Leave with renewed focus and confidence

 **Time:** 5–10 minutes

## Materials

- Post-its
- Sharpies

## Instructions:

The participants have done a lot during the workshop. When workshops end abruptly or without reflection, teams often miss the chance to anchor what they've built together. Here are suggestions for a closing activity to help the team walk away aligned, proud, and ready to execute. Choose 1 option.

### Option 1: Appreciations and Commitment

- Give the participants 1-2 minutes to think about these 2 questions individually and write it down on 2 post-its.
  - *“What’s one thing you appreciate about today’s session?”*
  - *“What will you do next to move the action plan forward?”*
- Then go around the group and ask the participants to share in the group (by sticking the post-its on the wall or just talking about it).

### Option 2: Surprised By... and Inspired By...

- Ask participants to reflect on 2 prompts and write it down on post-its:
  - *“What’s one thing that surprised you (on the positive note) during the session?”*
  - *“What inspires you to contribute to the success of the strategy goals going forward?”*

- Give them 1–2 minutes to write their answers.
- Then, invite participants to read their notes out loud one by one and place them on a shared wall or a flipchart.

 **Pro Tip:**

- Having the participant write down their thoughts on post-its upfront, prevents that everyone will be thinking about their contribution while others are talking. When they do so upfront, then will listen better to other's contribution.

# Final Words

This is the first version of the ***Strategy Reality Check Guide***. It's designed to help you lead a sharp, structured, and energizing session that brings clarity, alignment, and momentum to your leadership team's strategy.

Like any good strategy, this guide will evolve. You might find parts that need tweaking for your team, your culture, or your context and that's exactly the point. Use it, test it, adapt it.

What matters most is that you've now got everything you need to help leaders pause, reflect, and move forward with confidence. You're ready to create space for real conversations, surface the truth, and turn intent into action.

Thanks for bringing this important work to the table.  
Hope it serves you well and feedback is always welcome.

Let's get strategy moving.

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