

A dark, atmospheric landscape featuring a winding road that curves through a valley. The scene is illuminated by a soft, blueish light, possibly from a low sun or moon, creating a sense of mystery and depth. In the upper right, a thin crescent moon is visible against the dark sky. The overall mood is contemplative and serene.

**Do you all know where you're going?**

**How you'll get there?**

**What's needed from each of you?**

**And why it actually matters?**

## THE CHANGING FACE OF STRATEGIC PLANNING

# A vexing question

As the world spins faster, and the increasing pace and dimensions of change overwhelm the brittle, formulaic enterprise structures of old, there's a tension that all organisations are wrestling with...

**“How can we maintain a sense of calm and conviction, keeping one eye firmly focused on the longer term, the farther horizon, so that we can build toward something that'll last the test of time and deliver the legacy we set out to create...”**





## THE CHANGING FACE OF STRATEGIC PLANNING

... while at the same time,

**how can we move nimbly and quickly, to keep up with seismic shifts in our market, in technology, in staff expectations, in models of work, in policy, in environmental and social forces, in competition, and in evolving and emerging threats that continue to appear at every turn?"**



THE CHANGING FACE OF  
STRATEGIC PLANNING

# The old model is being remodeled

5-10 year strategic roadmaps – long considered the gold standard for helping organisations stay focused strategically (long term) as they execute tactical plans (shorter term) – are being reviewed, recalibrated or completely rethought evermore frequently, in order to cope with the escalating pace of change curves and market dynamism.



## THE CHANGING FACE OF STRATEGIC PLANNING

# The need for different

As this pace continues to grow, and as the culture of “command and control” fades into history books (misaligned as it is with the need for agility and the contemporary desire for staff empowerment and purposeful work), organisations need a clear means to keep their team pointing in the right longer-term direction while they navigate the vagaries and fast-flowing changes of their landscape.





## THE CHANGING FACE OF STRATEGIC PLANNING

# The need for clear and simple

Teams need a common means of guiding and aligning their actions without oppressive oversight, encyclopedic manuals or rigid rules.

Something that doesn't just live at Board or senior leadership level, nor requires an MBA to understand and apply.

Something clean, clear, focused and intensely practical, for all.

Something to guide their thinking, decisions, actions and how they work together in alignment.

Something other than a 20-page strategic plan.



Introducing

# GUIDELIGHTS<sup>®</sup>

A ONE-PAGE FRAMEWORK TO GUIDE & ALIGN  
YOUR ENTIRE TEAM.

**Aim toward. Shine out. Move beside.**

From



# GUIDELIGHTS ©

A clean, concise and contemporary alternative or adjunct to traditional strategic plans and development processes.

**Guidelights** is a focused and focusing means of helping every individual in an organisation understand;

- **Why we're here, what we're trying to be or deliver, and how we believe in going about it**
- **The standards we set, the principles we adhere to, and the paths we're committing to taking**
- **How my role fits, contributes and matters to creating the desired impact, and how I can work aligned with others**

Through a facilitated workshop process, **Guidelights** tests what stakeholders feel, think and know about the organisation, the opportunities, the challenges and the choices they face, as the sense check of their lived experience and insights.

It brings rigor to bear, with evidence-based probing and proving out of options, resulting in positions that are both believed in and empirically tested.

It incorporates storytelling and articulation of ideas in anecdotes, case studies, words and sentiments that fit the culture of the enterprise.

And it pressure tests the positions and ambitions by applying them to different scenarios and different roles in the team, to ensure they fit in good times and bad, and apply to all, from the CEO to the warehouse floor.

Ultimately, **Guidelights** tightens down to a single page – “The Torch” - that all team members can employ each and every day to guide their choices, align their actions, and keep them confident about their long-term impacts while they flex and adapt to changing environments.



## OUR WAYS

We embody...

## OUR IMPACT

We're committed to ensuring...

## OUR PRINCIPLES

Our decision and action fundamentals...

## OUR TEAM

## OUR DRIVE

We're here to...

## OUR PLAYS

For the (time period ahead), these are our highest priorities...

## LIGHT IT UP

Here's how we use our Guidelights

**Guidelights Template  
Example**

# The Guidelights

Guidelights workshops encompass 6 key elements that link together to form a complete and comprehensive tool that all team members can employ to guide their attitudes, decisions and actions.

1. **Driving force** – why we choose to pull together
2. **Impact areas** – important differences we're working to create
3. **Human standards** – the attitudes, beliefs & behaviours that connect us
4. **Guiding principles** – key statements that influence how we think, decide and act
5. **Priority Paths** – the areas we're overtly focusing on over the period ahead
6. **Means to apply** – how to use and benefit



# For example

What follows are three fictitious examples of what Guidelights 1-page summaries might look like and contain for some diverse fictional organisations. They don't reflect the nuance and depth of understanding that the workshops develop or flesh out, but they showcase how discussions can be distilled down to a clean, clear set of guiding ideals on a page. Each tool can be highly tailored to any organisation.

## 1. Winery (Malt Family Wines)

- Multi-generational family wine business with strong brand reputation and a regional history story underpinning its appeal, but needing to “modernise” for a new consumer group / changing attitudes

## 2. Accounting / business services (TSF Advisory)

- Mid-tier multi-partner financial and business services firm, focused on differentiating themselves through the bottom-line performance of their clients' portfolios while not taking their eyes of client service promises

## 3. Agribusiness (AgStrat)

- Multi-branch farming product resale & professional service / consulting business in regional Australia, with a loyal customer base, but seeking to grow in increasingly competitive sector during a challenging period





## OUR WAYS

*We hold dear to our heart...*



### Legacy

Respect our past, advance for our future



### Savouring

Where we are, what we do, who we're with and why



### Inclusion

A glass, a plate and a place for all at our tables



### Method

Follow the proven roadmaps, then pave ahead



### Veraison

Expect, embrace and make the most of change

*These mindsets tie us and find their way into our every day.*

## OUR IMPACT

*We're committed to ensuring...*

Every mouthful of Malt Family Wine **stops your world spinning** and reminds you that **life is worth living.**



## OUR DRIVE

*We're here to...*

**Better life's moments with Malt Family Wines.**

## OUR PLAYS

*Across 2024, we're moving the dial in 4 key areas...*

## OUR PRINCIPLES

*Our decision and action fundamentals...*

1. We treat customers like guests, guests like family, and family like treasure.
2. We better more lives by selling more wine, and we sell more wine by working to better more lives.
3. The lessons of history matter – reflect on them – and the path ahead hasn't been paved yet – create it.
4. Treat the business like you own it, because its sustained success relies on all of our choices every day.
5. If in doubt, ask. If still in doubt, try. If you've tried and it didn't blow up and you still have all your fingers, keep trying.
6. Ask yourself "is what I'm about to do something they and I will be better for in 10 minutes, 10 days or 10 years time?"
7. If there's a better way, use it, and use the gains you make to improve what you do.
8. It doesn't matter how amazing our wine is, it's whether the customer is having a great experience with it and us.
9. Your colleague knows more than you about something, and vice versa. What a powerful partnership. Leverage it.
10. Our customers are treasure, but our people are worth more. Be kind, supportive and nurturing of yourself and each other - savour your team and your time here in the Malt Family.

Next-level Customer Experience Creation	Product Ecosystem Evolution	Multi-function Cellar Door revamp	SuperStaff Support
<ul style="list-style-type: none"> <li>• <b>In their home</b> – Enhancing the "Wine Fam" club program, DTC tech investment program</li> <li>• <b>In our home</b> – Malt Events Project, CX challenge</li> <li>• <b>The 3<sup>rd</sup> place</b> – "WineDineRecline" program for resellers, alternative export partner strategy</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Energising the old</b> – traditional varietal lines refresh, new packaging program, consolidation of vines</li> <li>• <b>The petri dish project</b> – Superuser + grower advisory program on new cultivars &amp; package formats</li> <li>• <b>Regional collaboration</b> – Chardonnay + Chasselas Collab project, AWRI student challenge</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Capital works</b> – new corporate event wing and shipping container cabins for leadership retreats</li> <li>• <b>Hikers hub</b> – car park rework for pop-up events per partnership with XYZ active travel</li> <li>• <b>Massage room &amp; shed renovation</b> – mini day spa facility and "man cave" sporting reunion space</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Engagements</b> with University, TAFE and Mens Shed – 2 trainees and exchange workers per semester</li> <li>• <b>Training program</b> – 12 month activity schedule for existing staff and select partner organisations</li> <li>• <b>Vine shareholder initiative</b> – bringing staff in for equity (rows), enhancing reward and responsibilities</li> </ul>

## LIGHT IT UP

*Here's how we use our "Torch Tool"*

1. All staff review to calibrate actions with daily (first thing every day)	2. Weekly Tuesday morning tea talk –shares, exemplars, learnings	3. Monthly 2-hour lunch-n-learn sessions application	4. Torch induction of new staff by existing staff member (Day 1)	5. Owners calibrate strategic plans with (Monthly, Qtrly, Annually)
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## VALUES



**Discipline**  
Doing the known valuable thing, every time



**Strategy**  
Playing the long game with informed balanced decisions



**Accountability**  
Owning the choices, the work and the outcomes



**Research**  
Going deeper than others to find the ups, downs and best



**Service**  
to clients, to colleagues, to the business, and to your own professional value

## TSF ADVISORY EXISTS TO

Maximise and protect the financial wealth of every client it serves.

## GUIDING PRINCIPLES

Our research is comprehensive, focused and strategic

Our investments are the clear best choices for the desired goals

Our advice is informed, balanced and risk-clarifying

Our processes are fit-for-purpose, followed and forever improving

Our people are subject matter experts that work together for clients

Our clients are the reason we're here and our #1 focus

Our commitment is to continually learn, understand, improve and grow

# TSF Axioms

Guidelines for all  
TSF Advisory Staff  
2024-25

## PEAK OBJECTIVE 2025

>10% growth of clients, portfolios and market share.

## STRATEGIC PILLARS

Right Value-adding Partnerships	Applied Technology	Business Development	Staff Development
Research houses Fund managers Professional service firms "Initiate, nurture, manage and refine"	Market analysis Report generation Client communication "Better, faster, easier, enhancing value"	Inspiring the right referrers Retaining and expanding existing clients Attracting the right new clients "A compelling brand to the right clients"	Strengthen our current team Bring in the best new talent Lead the competition in valuable skills "Invest in evermore valuable people"

## HOW WE USE THIS TOOL

Read it every day.

Management reviews and reporting against it quarterly.

Think about how you'll apply it in your work and choices.

Full review 12-monthly.

Reflect on it weekly as a team.

Guide your choices with these lights and you will make better calls.

Share examples of it in action.





Our culture is...



**Open**  
ears, eyes, and minds, to new, better ways



**Learning**  
reflecting, researching, observing and asking



**Practical**  
good action beats perfect theory, "get good done"



**Honest**  
BS has no place here, tell the truth every time



**Supportive**  
have their backs, and trust they have yours

We're all here to...

# Keep farmers farming well.



Success means we're...

## Growing businesses and what they grow, profitably & sustainably.

Always keep in mind...

**Seed 1** – Be ready to be what they need, when they need it, and wherever possible, before they know they need it. Watch for the risks and opportunities they haven't seen yet.

**Seed 2** – To help others put their Oxygen mask on, you need to be wearing yours first. Ask for help if you need it. And if you're wearing one, start helping others with theirs.

**Seed 3** – Our ability to serve customers through thick and thin needs a strong financial base. Employ the levers of financial strength that you have access to accordingly.

**Seed 4** – Customers pick people they like and trust, and they like and trust people that show they care and are committed to helping them. Do what it takes to get picked.

**Seed 5** – If we run in different directions like Browns Cows, we'll burn time, money, relationships and energy for no gain. Work together, efficiently, and show it to others.

**Seed 6** – Assumptions create disasters. Ask questions like a 5 year old, then connect the dots and tailor what you're doing to the situation before you, not what you imagined.

For the next 3 years, we're putting the foot down on...

Range enhancement	Team enhancement	Coverage enhancement	Community enhancement	Governance enhancement
<ul style="list-style-type: none"> <li>Organic chem alternatives</li> <li>Digital decision-making tools</li> <li>Sustainability advice made easier</li> </ul>	<ul style="list-style-type: none"> <li>Key roles – tech, ESG, wellbeing</li> <li>Financial literacy training</li> <li>Leadership growth &amp; succession plan</li> </ul>	<ul style="list-style-type: none"> <li>3 new branches</li> <li>Fleet investment – mobile stores</li> <li>Strategic partnerships</li> </ul>	<ul style="list-style-type: none"> <li>Per town Council partnerships</li> <li>Little Growers School initiative</li> <li>Retirement homes wisdom project</li> </ul>	<ul style="list-style-type: none"> <li>Skills-based Board hires</li> <li>AICD training – all Board</li> <li>Branch manager training</li> </ul>

To make the most of this, we all need to...

Every team member	Every manager	Every branch	Every senior leader & board member
<ul style="list-style-type: none"> <li>Print this out and carry it daily</li> <li>Review it at least once a week</li> <li>Give examples / feedback of aligned activities at monthly branch meetings</li> </ul>	<ul style="list-style-type: none"> <li>Print this out</li> <li>Review it daily and at least weekly with a report</li> <li>Lead discussion about at monthly meetings and report back on progress in monthly reports</li> </ul>	<ul style="list-style-type: none"> <li>Print this out poster size and have it displayed where all staff can see it regularly</li> <li>Conduct one major Guidelights activity each year that exposes clients &amp; suppliers to our philosophies</li> </ul>	<ul style="list-style-type: none"> <li>Print this out</li> <li>Review it ahead of branch and board meetings</li> <li>Review one element per Board meeting per the meeting agenda schedule</li> </ul>





# 1. Driving Force

- Why we pull together
- Our “Why”, our Core Purpose or Mission, the reason the endeavour has been formed and continues to be in existence
- The deepest and most important rationale for all decisions, the legacy the enterprise is striving to create and deliver upon

**“We’re here to...”**



## 2. Impact Areas

- Significant outcomes we're working to deliver
- Our Vision or Big / Long Term Goals; the high level measures of success we align efforts to realise
- Outcomes that, if we're successful, will be clear manifestations of our driving force making a difference

**"We're committed to ensuring..."**



## 3. Human Standards

- The attitudes, beliefs and acceptable behaviours that connect us
- Our Values - the mindsets and worldviews and approach we share about how we should conduct our work; our ethos, our cultural norms, the acceptable (and not acceptable-to-us)
- The human assessment criteria about what (and who) fits and what doesn't, the underlying sentiment that's clearly manifesting in our best work

**“We embody...”**





## 4. Guiding Principles

- Ideas we employ for decision-making and all actions
- Commander's intent, our axioms, heuristics, "rules of thumb", the calibrating statements that influence how we think, decide, act and stay aligned
- Not hard-and-fast rules or dictates, but between 3 - 12 important reflection points and a mental framework all in the team can employ to check their actions fit the organization's "way"

**"Our decision & action fundamentals..."**



## 5. Priority Paths

- The areas we're specifically and overtly focusing on over the period ahead
- Our strategic priority lanes, the organisational dimensions, project areas or decision domains we're making clear choices in and putting disproportionate focus on for a time, because they'll help us succeed
- Above and beyond daily operational "business as usual", these paths are distinct aspects of our recipe for success, differentiators of us from others, resourced and focused on for their ability to propel us forward

**"For the (time period) ahead,  
these are our highest priorities..."**



## 6. Means to use

- Guidelights are designed to offer guidance to all team members, and so need to be communicated clearly - what do they mean and how should they be used in everyone's daily work
- This is a concept set and a tool to be employed by all staff, so in development, it needs to consider;
  - **Involvement and contribution** – ideally, these shouldn't be "top down" ideas, they should be created by involving as many team as possible / practical, in advance of, during and certainly post the workshop
  - **Communication** – once established, sharing and unpacking the Guidelights with all team members, explaining the rationale, breaking it down into stories and examples of how it fits across the whole organisation and what it can give rise to
  - **Engagement and application** – helping all team members test-drive their own roles and responsibilities employing the Guidelights, transitioning them from understanding to engaging and owning them
  - **Implementation and alignment** – creating means and moments where people can check in regularly on how they're utilising the Guidelights to shape their choices and actions, compare and explore overlap with colleague activities, and how to correct it if they're not
  - **Conflict breakers and choice shaping** – adopting the Guidelights to weight difficult choices, and bring clarity when priorities compete or conflict
- Practical steps defined on the document
  - A clear statement on how the tool will be employed and how it will be overseen, to share responsibility, to confirm it as the ultimate tool all staff need to engage with, and to hand responsibility to its holders
- *Optional* - Give your Guidelights tool a name
  - The default name for the 1-pager is "**The Torch**" – an illuminating document that summarises your Guidelights - but if you name it something that fits your culture and resonates with your team, it stands a greater chance of sticking and catching fire



# Guidelights element breakdown

Each Guidelights element is worked through a five-stage process.

## Check your gut

- What “feels right” for us? What do we think sits just beneath the surface of our decisions, subconsciously, the sentiments we consider before choosing, the attitudes and beliefs that we seem to be naturally aligning with?

## Assess the evidence

- What facts lead us to believe this is potentially the right or best choice? What evidence do we have for thinking this way? What data or story supports it or precludes / diminishes the alternatives?

## Tell the story

- Long form – what are we talking about here, what do we mean, how does it look in practice, how do we apply the concept to tangible situations?

## Boil it down

- Concise form – what’s the shortest, cleanest, clearest version of words that depict our choice, that expresses the essence of the idea in terminology that fits us perfectly?

## Test some scenarios

- Test the idea and words in several situations, from really common to the more challenging. Imagine them being employed by different people in different roles in the organisation – do the words stack up in all cases?





# Once you've developed your Guidelights...

You now have an invaluable resource for your organisation.

- An onboarding tool to attract, induct and guide new staff
- A focus for training topics, performance reviews and development plans
- A planning guide at all levels, from goal setting to resource allocation to tracking and reporting foci
- A team meeting agenda shaping tool, prioritising discussions on the most important topics
- Content for your marketing and communications material
- A framework for partnership discussions and priorities
- A ready reckoner for all staff to review daily and track progress, questions, ideas and aligned goals against
- A way to give depth and meaning to your brand, and the shared ambitions, stories and standards that it represents



# The illuminating advantage

Guidelights give organisations, and the teams that drive them, a clear, illuminating and efficient advantage. They shine lights on the most important things all the team need to know.

Everyone knows why they're working together.

Everyone knows where they're heading, together.

Everyone knows the shared behavioural standards and what that looks like in practice.

Everyone knows the key principles to apply, inform and guide decisions and actions, at all levels.

Everyone knows where focus is being placed in the organization for the period of time ahead.

Everyone knows how THEY can use the Guidelights in their role, all scenarios, all day every day.

It's a simple and brilliant way to pull a team together, out of darkness, into the light.

A team that's truly in unison.

A team that's fully aligned on the most important.

A team that can leverage the alignment, consistency and clarity to move ahead, confidently.





# Think your organisation might benefit from a Guidelights Workshop?

Get in touch with Strategy Road for a confidential discussion about your ambitions, challenges and what sort of Guidelights approach might best fit your culture and situation

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# GUIDELIGHTS®

AIM TOWARD. SHINE OUT. MOVE BESIDE.

