

News Flash

Competitive Simulations

Getting the Most from Strategic War Games

Strategic War Games, also known as Competitive Simulations, are a highly effective model for developing proactive strategies for business planning. By creating a simulated game of an anticipated change triggered by a competitor, a cross-functional group of internal and external personnel can come together to test ideas in an inspiring, fun, non-threatening, and stimulating environment. It can also be useful for an internal change. Metaplan's unique expertise as a "facilitation and moderation" agency makes it a perfect choice for companies interested in a strategic gaming program. Metaplan is in the business of helping clients create a dialogue to understand issues on a daily basis and strategic gaming is a natural venue for them to carry out the Metaplan approach. Metaplan's staff holds the highest level of expertise and experience in the facilitation of discussion designed to evaluate complex issues, broaden perspectives, and overcome thinking barriers to find solutions.

"The notion of war games is always the same," explains Alanna Kaplan Muñoz, Principal at Metaplan. "The decision to participate in a simulated war game exercise is normally triggered by the need to analyze an anticipated situation through a strategic dialogue. It is often designed to bulletproof a strategic approach or evaluate different scenarios. By engaging the various members of different organizational functions (marketing, sales, regulatory affairs, finance) in a strategic dialogue, the team can learn new insights in order to fine tune their ideas and anticipate potential responses."

Metaplan's war game process usually involves two phases. The first is facilitation of the actual war game exercise, in which insight creation takes place and participants have the opportunity to examine options and analyze intended and unintended consequences of choosing specific courses of actions. The second phase is characterized by the creation of a shared understanding of the insights among the team members and to align them in their thoughts on how to translate them into organizational action steps.

Metaplan's war games include:

- Identifying opportunities and risks in order to enable the success of new strategies and tactics
- Enabling the processing of ideas based on the diverse range of participant expertise
- Facilitating a process of interaction that leads participants to their own collective solutions
- Leveraging a company's intelligence to anticipate and envision the competitor's strategy
- Aligning on the results by guiding participants in efficient discussion with the goal of driving change for a desired result

Muñoz stresses, "In the end, after a successful war game exercise, something has to change. We want to translate what we have learned through the game into organizational action. The key question people need to ask themselves after the exercise is: What are we going to do differently, now that we gained these new insights?"

akm@metaplan.com

Dear Reader,

Reflecting on 2011, it was a year filled with successes: from Metaplan's celebration of 10 years in the US, various great engaging, productive projects and workshops, to the advancement of several new initiatives. We also made some headway regarding our three expansion areas – geographic territory, industries served, and technological advances:

Enzaim Communications in Zurich is now Metaplan's official representative in Switzerland. In addition, we are actively looking into similar expansions in Italy, Portugal, and Asia (namely Singapore). Stay tuned.

Here in Princeton, we welcomed two new Metaplanners, Jacquelyn Wieland and Karina Clausen, who bring with them expertise in cross-cultural consulting, executive coaching, and training. Having them on board, we feel we can offer an even more rounded portfolio to bring shared understanding and shared commitment to our clients – in pharma or other industries. (Read their bios in this newsletter to see why we are so excited to have them.)

Technology wise, we have added new pieces to our electronic tool box that enable us even better to bring groups together in electronic workspaces.

Be sure to stop by our newly redesigned website to learn more about the latest developments and projects that we hope will make 2012 another great year.

All the best and Gruss,



Franz-Josef Tillmann [President]
fjt@metaplan.com



New at Metaplan

Jacquelyn K. Wieland

Jacquelyn K. Wieland has worked with a wide range of clients in the pharmaceutical, technology, financial, and non-profit sectors. With her vast experience in consulting and facilitation, Jacquelyn leverages on Meta-



plan's method to reach shared understanding and shared commitment with corporate leadership teams and non-profit boards of directors. Leaders, challenged with complex issues requiring cross-functional alignment and consensus, need to hear all voices in order to shift organizational structures. Jacquelyn is delighted to blend and integrate this methodology and facilitation process into her portfolio of solutions for clients in need of shared understanding and appreciation of perceptual differences in strategic alignment and problem solving.

Jacquelyn's areas of expertise are in organizational, team, and individual performance. The majority of her consulting, facilitation, and coaching work are in the areas of strategic planning, sales performance, leadership development, communication, and team alignment. Jacquelyn is often engaged as a speaker/facilitator at non-profit Board of Director Retreats, planning sessions, and leadership meetings. Jacquelyn brings a strong sales, team and leadership training and development background to Metaplan. Her corporate background includes working as a customer relations manager for American Honda Motors, an account manager and corporate sales trainer for Digital Equipment (now HP), Director of HR Development for BPP Financial consultancy in London, England, and consulting with clients in the Pharmaceutical, Financial, Technology, Insurance, Petro-chemical, and Non-profit industries over the past 15 years. Jacquelyn will continue to run Solutions Provided while merging their corporate offerings with Metaplan's consulting and facilitation offerings.

Jacquelyn has an MS from Oklahoma State University and a BS from Texas State University, is a Senior Birkman certified consultant, and holds her NJ Life and Health insurance license.

Metaplan for Non-profits

Using Dialogue to Manage Future Shifts for Non-profit Leaders

It has been my privilege to have served as a consultant and facilitator to various non-profit organizations, leaders, and their members since 1998. The majority of my non-profit experience has been with large non-profits that are dependent on membership and volunteer boards of directors which turn over yearly. As I join the Metaplan facilitation and consulting team and work on blending some of my past consulting experience with new offerings, I am thrilled with the capacity that Metaplan facilitation and moderation offers non-profit leadership teams who are challenged with alignment issues, collaborations, and shared vision as they battle to preserve the best of their history and embrace shifts of change moving forward. The engagement of various views and the opportunity of productive dialogue is significant and required as leaders come together to move these organizations forward. Metaplan offers a facilitation method that is engaging for all the minds and voices at the board table while moving the dialogue to shared understanding and consensus of what needs to be tackled strategically.

My observation is that the non-profit sector will continue to be tested as various shifts change the face of its members' engagement. Technology affords and demands greater responsiveness and transparency; it also creates tension, misunderstanding, and misalignment due to its literal format. The blending and blurring of lines for public, private, and non-profit sectors will continue to heighten interest on community impact issues and involvement as people focus on local engagement. This will enhance the need for productive communication methods for leaders while creating new competitive and collaborative opportunities. Over time it will bring forth the question of what it means to be a non-profit organization.

While change is nothing new, the accelerated pace of it is: social media, technology, and financial shifts occur, impact one another, and present demands and challenges that require adaptive responses from organizational leaders.

When I was in graduate school many years ago we studied futurist and looked at trends. The non-profit sector will need to become futurist to survive and thrive; they will need to adapt faster along with leaders who are visionary with an element of risk taking. This means that non-profits, donors, and organizational builders must be attuned to rapid and continual shifts in the complexity of the environment. They will need to evaluate and synthesize how organizations best adapt and shift while testing new approaches. In order to move forward and survive they will have to define leadership differently and pull many of their answers from within their own boards and member bodies.

Complex shifts have profound implications for the future of leadership, organizational culture, and structure, which will demand innovation in thinking. These shifts will start with dialogue and learning how to listen to each other and appreciate varied viewpoints. It is much more than just talking; it is really absorbing and understanding the implications of change for survival and contribution. Non-profits of the future will go beyond generational and representational diversity and focus on developing organizational strategy and leveraging diverse ideas, approaches, and talents in the support of the mission of their focus.

We are looking forward to launching new offerings to boards of directors of non-profits and organizational leadership teams who are challenged with complex and dynamic organizational issues.

jkw@metaplan.com

New at Metaplan

Karina Maria Clausen

Karina Maria Clausen is delighted to join the Metaplan team, bringing a broad range of experience with companies in a variety of industries including media, finance, automotive, construction, energy, and consumer products in both the United States and Europe. Her professional competencies, cross-cultural expertise, and global perspective in communication, strategy, brand, and image provide clients with a fresh view on realizing their most valuable asset – their people. Karina’s belief that communication based on dialogue principles is the most important ingredient for success in business relationships fits with Metaplan’s use of dialogue to create shared understanding and commitment in organizations.



Prior to joining Metaplan, Karina managed her own independent consultancy, where key projects included:

- facilitation of C-level leadership development programs
- design and facilitation of corporate branding and vision programs to guide clients towards increased understanding on key branding initiatives
- development and facilitation of cross-cultural programs for senior executives
- management of a trade mission for a foreign government office of economic development

In addition to her consulting experience, Karina has held management positions in advertising, finance, and publishing in Europe and the United States. Her management experience includes the launch, in Germany, of a multi-national advertising agency branch.

Karina has a Bachelor of Arts from the University of Delaware, has completed graduate work at Columbia University, studies at the University of Munich, Germany, and an executive program in Mergers and Acquisitions at The Tepper School of Business at Carnegie Mellon. Karina’s working languages are English and German.

As an experienced facilitator, Karina is eager to apply Metaplan’s methodology to guide clients towards alignment and consensus. She is excited to use Metaplan’s unique “consulting-from-within approach” to support strategic change initiatives where engagement across functions is critical. Some of the areas she specializes in are pre-merger cultural due diligence, post-merger integration, communication dynamics, and branding and vision strategies. She also blends these approaches with her executive coaching experience to empower individuals to achieve their goals.

Team on Books

Creating Shared Understanding on Business-Book Concepts

Metaplan is excited to announce Team on Books, a new program that translates concepts from popular business books into a useful, real-world application to a team’s current challenges.

“When an individual reads a business best seller, that person has his or her own idea of what it means to them. Team on Books helps working groups use these ideas to collectively tackle their challenges and take advantage of key opportunities,” says Franz-Josef Tillmann, Managing Partner of Metaplan US.

“For example,” he said, “if a leader has the team read Jim Collin’s classic, Good to Great, each reader would have their own idea of what the hedgehog concept means to them. Team on Books creates a shared understanding of that concept, and how it applies specifically to their goals and their team.”

These seminars acquaint participants with essential principles and give them a way to use the ideas as a group. As always with the Metaplan approach, consultants empower teams to jointly arrive at their own solutions. In addition, these book-inspired discussions provide a stimulus to move leadership

teams to a higher level of thinking. New avenues of thought are opened and a common language is shared that help groups communicate better and arrive at new solutions.

Topics include:

- Employee Engagement
- Change Management
- Market Leadership
- Team Functionality
- Lateral Leadership
- Innovation

A creative way to engage teams at offsite meetings, this new program combines Metaplan’s proven method of creating alignment among cross-functional teams with best-selling business books. Team on Books is a fun way to promote personal development for your group within the context of the organization.



Metaplan at Home



Where we work when we are not on the road



Virtual News

Metaplan on the Web

We thought you might like to know what is going on with Metaplan online. So here is what's virtually new:



New Metaplan website launch – we have a completely new look online: check it out at www.metaplan.com or just scan and follow the QR code!



Metaplan Facebook Giveaway – be one of the first 10 this month to like Metaplan and win fun Metaplan merchandise! Just go to Facebook, search for Metaplan LLC, and click like.



Metaplan LinkedIn Group – we are creating a Metaplan LinkedIn group. Let us know what topics you would be especially interested in. Email your suggestions to LinkedIn@metaplan.com.

Looking forward to seeing you on the web!

Metaplan Quiz

How Well Do You Know Metaplan?

1. Since opening its doors in 2001, which of these types of meetings has Metaplan US NOT conducted?

- a. Strategic Planning Workshops
- b. Advisory Boards
- c. Leadership Team Meetings
- d. PowerPoint Seminars
- e. Stakeholder Interviews
- f. Strategic Retreats

2. Of the over 630 meetings that Metaplan US has facilitated since its inception, which of these is true?

- a. Metaplan US has conducted meetings in 12 states.
- b. Metaplan US has conducted meetings in more than 20 states.
- c. Not only has Metaplan US facilitated meetings in red and blue states, but also purple and plaid states.
- d. Metaplan US has facilitated meetings in every state except Alaska.



3. What is Franz-Josef's favorite expression?

- a. The whole enchilada
- b. Rock solid
- c. Donkey chain
- d. Just to play devil's advocate
- e. All of the above

4. Which of these extra-curricular activities had Metaplan NOT sponsored?

- a. Little League softball team
- b. Horseback-riding events
- c. Card-pinning marathon
- d. Take-Your-Child-to-Work Day

Answer Key: 1.d - 2. b - 3. e - 4. c

