

**2017 CREW Leadership Forum Series: The Strategic Leader**  
**Workshop #1 The Strategic Leader – An Introduction**

**March 23, 2017**

**Business Case #1 Foundation Strategy**

**Directions:**

Take a few minutes to read the case below. Afterwards, you will discuss it with a team of CREW Members to answer the questions below related to how the protagonist can effectively demonstrate the Strategic Leadership skills (Strategic Thinking, Strategic Acting and Strategic Influencing).

**Case:**

Diane has been with her organization since she completed college, almost 20 years ago. She has served in a variety of roles in Corporate Affairs and Corporate Communications, and is currently working as a part of the company's Foundation. The company, a global market leader, has come through years of successive layoffs and retrenching, and last year, a merger with a competitor. The organization is once again growing.

Diane has always been a reliable, loyal, consistent employee with a history of positive performance reviews. Well-dressed and presentable, never ostentatious or flashy. Smart, analytical, precise. Her managers count on her to do whatever it takes to get the work done. Diane has been deferential to senior leaders. She works late, picks up the slack, is always there.

Diane is passionate about the work of the Foundation. Recently, she won accolades for the creativity she brought to a new program for awarding Foundation grants. With the most recent reorganization Diane has a new boss, an affable Brit based in the UK. Patrick recognizes Diane's talent and hard work, and has worked closely with her over the past year. As a result, he provided a strong recommendation and she was promoted into her dream job, President of the Foundation.

She now has a mentor and a particularly challenging role at a challenging juncture: Diane has been charged with developing and presenting a new vision, budget and plan for the Foundation's future when the future of the Foundation is no longer assured. With the recent merger, significant questions have surfaced. Is the Foundation still relevant? Should it be dissolved or should it move forward? How should it be funded moving forward?

Diane is expected to present her plan at the next meeting of the Foundation Board in three months. The Board will be prepared to vote on the fate of the Foundation. The future of the Foundation will require her compelling story.

As she prepares for the upcoming meeting, Patrick offers his advice: 'Diane, none of these folks know a fraction of what you know about the Foundation. They will be looking at this stuff for 20 minutes before the meeting. You live it! Get your swagger on and take a seat at that table.'

**Discussion Questions:**

Discuss the questions below, capture your group's ideas and prepare to share highlights.

- How might Diane best exercise Strategic Leadership skills in preparing for the upcoming Foundation Board Meeting?
- How might Diane Think Strategically, Act Strategically, Influence Strategically?