

The Sustainable Enterprise Learning Guide

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Instructor Materials

Chapter 3

Developing a sustainability strategy: Interview
checklist for a sustainable strategy analysis

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Editors' Notes:

These materials are intended for use by academics and practitioners. In order to simplify the language, editors have determined to use the terms instructors, learners or participants rather than facilitators, professors or students.

ACTIVITY INTRODUCTION AND OVERVIEW

Objectives

Upon completion of this activity, the learner will/will be able to:

1. Describe the Universal strategy formulation model
2. Provide at least one detail behind each of the seven elements of the model
3. Develop a checklist for conducting a structured interview
4. Apply the model in developing a sustainability strategy or reviewing someone else's

Activity Length

50 minutes

Audience Description

These activities are designed for the undergraduate, or graduate/practitioner level learners.

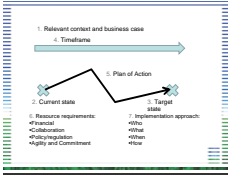
ACTIVITY PREPARATION


Activity Name	Developing an Interview Checklist for a Sustainability Strategy	
Preparation Checklist	<p><u>At least one day in advance:</u></p> <p>Instructor Preparation:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Review Universal strategy formulation model presented on page 106 of The Sustainable Enterprise Fieldbook <input type="checkbox"/> Make enough copies of the Handout: Key issues and questions, one for each student <input type="checkbox"/> Develop questions you might ask as examples when you are presenting the activity <p>Check Supplies and equipment needed including:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Overhead projector and screen <input type="checkbox"/> Printed copies of the Participant Guide (one copy of each handout for each participant) <input type="checkbox"/> One flipchart for each group in the program (up to 6) and plenty of markers in different colors <input type="checkbox"/> Set up the room 	
Timing Flow	<p>Step 1. Activity set-up</p> <p>Step 2. 1st Module (covering elements 1 & 4)</p> <p>Step 3. 2nd Module (covering elements 2,3 & 5)</p> <p>Step 4. 3rd Module (covering elements 6 & 7)</p> <p>Step 5. Activity measurement and wrap up</p>	<p>5 minutes</p> <p>12 minutes</p> <p>12 minutes</p> <p>12 minutes</p> <p>9 minutes</p>
Total Time	50 minutes	
Pre-reading	Read Chapter 3 of The Sustainable Enterprise Fieldbook section on <i>The Process of formulating and implementing sustainable strategy</i> and review the Universal Strategy Formulation Model presented on page 106.	
Pre-work	None	



ACTIVITY: DEVELOPING AN INTERVIEW CHECKLIST FOR SUSTAINABLE STRATEGY ANALYSIS

The name of this activity is *Developing an interview checklist for sustainable strategy analysis*. The purpose of the activity is to provide the learner with an opportunity to practice using the Universal strategy formulation model as presented in Figure 3-5 on page 106 of the *Sustainable Enterprise Fieldbook*. The activity primarily consists of using the seven elements of the Model by developing lists of interview questions one would use if engaged in a consulting assignment to interview an organization about its sustainability strategy.

This “acting as if a consultant” approach helps put the learner into a context where the details behind the general model become more apparent. The outcome of the activity is for each learner to develop a set of questions that delve into the kind of detailed information required to flesh out the seven elements of the Model. This experience using the model enhances the learner’s ability to use the Model for either developing a sustainability strategy or assessing the sustainability strategy of other enterprises.

Instructor notes	Activity description
<p>Step 1. Activity Set Up (Estimated 5 minutes)</p>  <p>Slide 1</p>	<p>Say: Please turn to the Universal strategy formulation model on page 106 of The Sustainable Enterprise Fieldbook (Fieldbook).</p> <p>Our activity today is called <i>Developing an interview checklist for sustainable strategy analysis</i>. The purpose of the activity is to provide you with a hands-on opportunity to practice using the Universal strategy formulation model.</p> <p>Please review the Model and notice that there are 7 elements. Each of these elements is an aspect of a complete strategy. At this generic level the model looks simple. However, as you will discover during this exercise, there are many specific data items contained in these 7 basic elements when it is applied to formulating a Sustainability Strategy.</p> <p>Ask: What questions do you have about the overall Model?</p> <p>Potential Learner Question: 1. <i>I do not understand the Model. Which of these elements is “the strategy”?</i></p> <p>Instructor Response: A strategy is the combination of each of these elements. People often think that a “strategy” is simply the “Desired Outcome” or the “Plan of Action.” However, a comprehensive strategy contains all seven elements.</p> <p>Potential Learner Question: 2. <i>How is this generic model different than a “Sustainability Strategy”?</i></p> <p>Instructor Response: This Model is a generic model that applies to any type of strategy, such as a strategy for a new product or a new venture. It can also be applied to a “Sustainability Strategy.” When it is, the kind of information contained in the Sustainability Strategy will be about sustainability issues in contrast to information about a new product or a new venture.</p> <p>Potential Learner Question: 3. <i>Is this model for formulating a strategy or analyzing a strategy?</i></p> <p>Instructor Response: This Model can be used for either. If someone is developing a new strategy, this Model helps assure all the critical issues have been considered. If someone is using the Model to analyze an existing strategy, the Model provides a framework to ask questions to understand the strategy.</p>

Instructor notes	Activity description
	<p>Say: The activity primarily consists of using the seven elements of the Model by developing lists of interview questions for use in a consulting assignment when interviewing an organization on its sustainability strategy.</p> <p>This “acting as if a consultant” approach helps put you into a context where the details behind the general model become more apparent. The outcome of the activity is a set of questions that delve into the kind of detailed information required to flesh out the seven elements of the Model. This experience using the model will enhance your ability to use the Model for either developing a sustainability strategy or assessing the sustainability strategy of other enterprises.</p> <p>The activity breaks the seven elements into three modules. In each module you will list the questions you would ask of the CEO of an enterprise about their sustainability strategy. You will not be able to complete the development of a checklist during this 50-minute session, but only begin the thought process. You are encouraged to continue this activity outside of the classroom to complete the checklist.</p> <p>Do: Distribute Handout: Key issues and questions</p>
<p>Step 2. 1st Module (covering elements 1 & 4)</p>	 <p>Say: The purpose of this first module is to focus on elements #1 and #4 of the Model (relevant context and business case and Timeframe). These elements set the basic context for the sustainability strategy. Let’s begin by reviewing the short list of questions provided in the text on page 107 of the Fieldbook.</p> <p>This is a random set of questions for element #1. What is different about this exercise is to create lists of Key Issues and the questions that delve deeper into each of the Key Issues. For example, a Key Issue could be, “The potential impact of an enterprise’s sustainability strategy on its competitive environment.”</p> <p>To discover the information behind this Key Issues requires a set of questions to uncover the underlying information. This would involve listing a set of questions that would be asked to discover the details behind the Key Issues. Such as:</p> <ul style="list-style-type: none"> • What features make up the sustainability strategy for your top three competitors? • How do your customers view “sustainability” as a differentiator from your competitors? • How have factors of sustainability affected your overall industry sector? <p>For both elements #1 and #4, list the Key Issues and then the questions you would ask to get insight into how that Key Issue helps determine the enterprise’s sustainability strategy.</p> <p>Starting with two clean sheets of paper, label each of them with the name of elements #1 and #4. First list the Key Issues for element #1. When you have finished with that, write questions you would ask the CEO of an enterprise to understand that issue and how it affects the enterprise’s sustainability strategy. Then repeat for #4.</p>

Instructor notes	Activity description
	<p>Ask: Are there any questions?</p> <p>Say: You have 10 minutes—begin.</p>
<p>Step 3. 2nd Module (covering elements 2, 3 & 5)</p>	 <p>Say: The purpose of this second module is to focus on elements #2, #3 and #5 of the Model. These are the current and target state as well as the plan of action.</p> <p>These elements make up the basic roadmap for the sustainability strategy. Again, review the short list of questions provided in the text for each of these elements (pp 107-109).</p> <p>Similar to the prior module, for each of the three elements, list the Key Issues and then the questions you would ask to get insight into how that Key Issue helps determine the enterprise’s sustainability strategy.</p> <p>Starting with three clean sheets of paper, label each of them with the name of elements #2, #3 and #5. First, list the Key Issues for element #2. When you have finished this, write questions you would ask the CEO of an enterprise to understand that issue and how it affects the enterprise’s sustainability strategy. Repeat this for the other two elements.</p> <p>Ask: Are there any questions?</p> <p>Say: You have 10 minutes—begin.</p>
<p>Step 4. 3rd Module (covering elements 6 & 7)</p>	 <p>Say: This third module focuses on elements #6 and #7 of the Model (resource requirements and implementation approaches). These elements provide the detailed requirements for implementation of the sustainability strategy. Again, review the short list of questions provided in the text for each of these elements.</p> <p>Similar to the prior module, for each of the two elements, list the Key Issues and then the questions you would ask to get insight into how that Key Issue helps determine the enterprise’s sustainability strategy.</p> <p>Again, label two pages with the name of elements #6, and #7. First, list the Key Issues for element #6; then write questions you would ask the CEO of an enterprise to understand that issue and how it affects the enterprise’s sustainability strategy. Next, go on to element #7 and repeat the same process.</p> <p>Ask: Are there any questions?</p> <p>Say:</p>

Instructor notes	Activity description
<p>Step 5. Activity measurement and wrap up</p>	<p>You have 10 minutes—begin.</p> <p>Say: I know this has been a lot to cover in a short period of time. It is almost impossible to create a complete checklist in such a short period. This activity was to help you get started in the process.</p> <p>Ask questions to check learning, such as:</p> <ul style="list-style-type: none"> • What did you learn from this process? • What are the seven elements of the Universal Strategy Formulation Model and which are the most important in your opinion? • What did you find valuable about this activity? • How long do you think it would take to develop a comprehensive checklist for all of the information you might want in assessing a sustainability strategy? <p>Say: Hopefully, it has been a good learning experience to go through this activity of developing a checklist of the questions you would use to understand an enterprise’s sustainability strategy. The same questions can also be used to formulate a sustainability strategy.</p>

ACTIVITY MEASUREMENT

Type of measurement: guided discussion

Ask the following questions and estimate learning impact based upon responses:

- What are the seven elements of the Universal Strategy Formulation Model and which are the most important in your opinion?
- What did you find valuable about this activity?
- How long do you think it would take to develop a comprehensive checklist for all of the information you might want in assessing a sustainability strategy?

FOLLOW-UP: RESOURCES/ACTIONS

Apply the same “checklist development process” then conduct an actual assessment of a specific company of interest.

HANDOUT: KEY ISSUES AND QUESTIONS

Instructions:

The activity primarily consists of using the seven elements of the Model (in the left column) and developing lists of interview questions one would use if engaged in a consulting assignment to interview an organization about its sustainability strategy. Develop a set of questions for each element and write them in the row on the right.

Element	Questions
1. Relevant Context and 3. Timeframe	
2. Current State 3. Target State 5. Plan of Action	
6. Resource Requirements 7. Implementation Approach	