



THE STRATEGIC OFFSITE

OVERVIEW

Partner and Director teams rarely get the space to step back and think about their business with fresh eyes.

The Strategic Offsite is a one or two-day, in-person workshop that gives leaders the time and structure to reflect, make sense of what's really happening in their market, and agree on a clear way forward.

Across the session, teams explore where to play, how to win, and how to align their practice to the organisation's broader strategy and strengths.

They leave with clarity on direction, alignment on the actions and behaviours required, and confidence in how to measure progress.

WHO IT'S FOR

- Partner and Director teams leading a practice, firm or business unit.
- Teams that need clarity, focus, and shared ownership of their strategy.
- Leaders ready to move from competing priorities to a unified plan.

WORKSHOP OUTCOMES

- Create a clear, practical strategy on a page, aligned their organisation's strategy and strengths.
- Understand and align on what's really happening in their market and what clients truly value.
- Define how their practice delivers distinctive value and stands out from the competition.
- Align around the behaviours and culture required for success.
- Identify key risks and define practical mitigation moves.
- Build a dashboard to measure and maintain progress.

DELIVERY FORMATS & AGENDAS

DO WE NEED 1 OR 2 DAYS?

The length of the offsite depends on the level of strategic clarity your team already has.

- **1 Day** — ideal for teams that already have a defined direction and want to align on the plan, actions, and culture needed to deliver it.
- **2 Days** — recommended for teams that need to pause, think deeply about where to play and how to win, and reframe their strategy before finalising the plan for delivery.

FOLLOW-UP OPTIONS

To maintain momentum and accountability beyond the offsite:

- 60-minute accountability sessions to review progress, unblock issues, and track implementation.
- Quarterly half-day alignment and progress sessions to revisit the strategy, assess impact, and reset priorities for the next quarter.

DELIVERY FORMATS & AGENDAS

1-DAY OFFSITE AGENDA

Morning — Clarity and Focus

Align on organisational goals

Confirm how the practice contributes to broader firm strategy and success measures.

Market and client insights

Identify trends, client needs, and competitive shifts shaping your priorities.

Strategic ambition and positioning

Define where to play, how to win, and what differentiates your practice.

Draft your Strategy-on-a-Page

Capture key choices, priorities, and success metrics in a clear framework.

Afternoon — Action and Alignment

Translate strategy into action

Turn priorities into clear initiatives with ownership and measurable outcomes.

Embed culture and behaviours

Define the team habits, leadership behaviours, and ways of working that will drive execution.

Address risks and dependencies

Identify key risks and interdependencies; agree mitigation and focus areas.

Build the Strategy Dashboard

Establish measures, accountability rhythm, and next steps for implementation.

HOW IT WORKS

The offsite is designed as a structured space to pause, reflect, and realign.

Through guided discussion, practical analysis, and collaborative planning, the team builds shared clarity on goals, choices, and actions.

If the focus includes team behaviours and culture, a **Team Alignment Survey** can be included beforehand. This provides insight into how the team is currently working together, where alignment is strong, and where shifts in leadership or collaboration may be needed.

For teams/organisations designing a completely new strategy, this program can expand into a broader journey by adding **Fresh Thinking in Professional Services** (1 day) — to challenge assumptions, identify new opportunities, and reimagine how value is delivered.

Alternatively it may be useful to do a **Full Strategy Design Program** (2 workshops over two months) — a deeper process combining Blue Ocean Strategy and Playing to Win.

It includes:

- **Workshop 1:** explore client value, market dynamics, and competitive positioning.
- **Interim period:** conduct your own focused research and internal testing.
- **Workshop 2:** make clear choices on where to play and how to win, translating insights into a focused implementation plan.

EXPLORE MORE PROGRAMS

Getting Ready for Promotion

Equip high-potential leaders with behaviours, visibility, and strategy to step up.

Delivery Options to Choose From:

- 2-day immersive
- 1-day intensive
- 90-min virtual series*

Step Into Leadership (First 90 Days & Beyond)

Support newly promoted leaders to build credibility, alliances, and early wins.

Delivery Options to Choose From:

- 90-min virtual series* (1:1 or group)

From Leader to Executive Team

Transform senior groups into true executive teams with trust, alignment, and results.

Delivery Options to Choose From:

- 1-day offsite
- 90-min virtual series*

Your Leadership Style in Action

Build self-awareness and adaptability so leadership lands with clarity and impact.

Delivery Options to Choose From:

- Full-day with profiling
- Half-day without profiling
- 90-min virtual series*

Team Fuel

Reignite team purpose, priorities, and engagement for stronger collaboration and results.

Delivery Options to Choose From:

- 1-day team workshop
- 90-min series*
- Optional follow-up team surgery

Emotional Intelligence in Professional Services

Strengthen self-awareness, composure, empathy, and relationships under professional pressure.

Delivery Options to Choose From:

- 2-day immersive
- 1-day intensive
- 90-min series*

Fresh Thinking in Professional Services

Make innovation a habit through reframing, ideation, and low-risk experimentation.

Delivery Options to Choose From:

- 1-day workshop
- 90-min virtual series*

Leading Change

Equip leaders with tools and rhythms to lead change that sticks.

Delivery Options to Choose From:

- 1-day workshop followed by 4 x 60-min momentum sessions
- Online self-guided program*

Communicate with Impact

Simplify complexity, connect with story, and deliver messages that inspire action.

Delivery Options to Choose From:

- 1-day workshop
- 90-min series*
- Optional pitch-prep clinics

***Available virtually, to suit all global time zones.**

All programs have option to add on group or individual coaching

A Note From Me



Sarah



**Book a call
to discuss
your needs**

Who I Work With

I partner with leaders and HR teams across professional services — from large global firms to smaller partnerships — in law, consulting, accounting, and business services.

My Background

With over 20 years in leadership development, I've worked both as a management consultant and inside professional services organisations.

I understand the realities of these environments: always-on, commercially driven, and shaped by cultures that prize logic, analysis, and precision.

What I Deliver

- Leadership development that busy professionals value.
- Practical content designed for analytical, time-poor audiences.
- High-ROI programs that strengthen leadership, engagement, and growth

How I Work

I bring proven frameworks, but I adapt them to your context and culture.

My programs are no-nonsense, commercially grounded, and designed to make an immediate, visible difference — in how leaders show up, how teams collaborate, and how organisations grow.

All programs can be delivered **in-person or virtually, across time zones** to support both global and local teams.