



CHAPTER TWENTY-FIVE

I Matter: Remaining the First Person in Strategy Research

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I Was There

“Welcome to our first strategy retreat together! I’d like us to get to know one another a bit more before we ‘get down to business,’ and I would like to start. Let me tell you about my private life . . .” The new CEO, Mary, had gathered her entire leadership team for a first retreat to revisit and revise the company strategy. This was the kick-off presentation and as a consultant hired by Mary to help with both facilitation and content inputs, I remember how much I enjoyed this assignment. That evening Mary shared very personal stories from her professional and private life – successes and failures, hopes and aspirations – with the people whose trust she sought and needed, to do a good job. While her final anecdote was met with laughter, several participants later told me that it set the stage for the subsequent conversations and outputs. In one of her previous jobs she had asked her boss to share the company strategy with her. “I can’t,” he supposedly said, “it is in the safe.” Mary was not only talking about herself, she was talking about what strategy meant to her and how she had been initiating and leading processes to develop and implement strategy in other companies. I tried to listen, observe the people gathered, and take as many notes as possible, while thoughts raced through my mind. It was difficult to know what to scribble down, and my already bad handwriting gradually became unreadable. I let go of the pen and made a conscious effort to sharpen my senses and memorize the experience instead.

The two days unfolded in a spirit of trust and people often cited each other’s personal stories from the evening before. I was not the only one who seemed to be enjoying this retreat, and I had rarely seen people work so hard to share and respect one another’s views about what they thought should be done.

My own feelings surprised me: I really liked, and even admired this CEO. She was the best I had ever seen in eliciting what became two days of frank conversations about strategy. This retreat was so unlike the many others I had observed and

