

Unlocking the potential of Board Strategy Days

Dr Marc Levy



Right thinking

Board Strategy Days (BSDs) are vital for aligning boards and management teams on strategic priorities. Their success hinges on thoughtful design, harnessing different perspectives, proven methods and skilful facilitation. Effective BSDs prioritise interactive discussion over presentations, encourage co-creation between directors and management, and ensure all voices are heard—unlocking clarity and cohesion, and creating strategic momentum.



BSDs are pivotal moments for boards to deeply engage with an organisation's strategic direction, align on critical priorities, and reinforce collective decision-making. When well designed and facilitated, BSDs can become powerful forums for driving clarity and momentum. However, achieving this impact demands careful forethought and a nuanced understanding of board dynamics.

Based on my experience of nearly 250 BSDs, this article offers practical insights and proven recommendations for planning and executing them effectively.

Strategic context and alignment

Board directors are acutely aware of their legal and practical responsibility to review, challenge, approve, and oversee strategy. This is one of their two or three most critical duties. As such, directors frequently seek to explore strategic objectives, medium- to long-term priorities, and risk considerations during BSDs, even when this might not align perfectly with the organisation's planning calendar.

Many directors bring with them preferred strategic frameworks or mental models, such as 'where to play/how to win', generic strategies, or performance measurement methods. They often want assurance that such approaches are addressed meaningfully across the planning cycle.

A key challenge lies in the misalignment that can exist—among directors, and between the board and management. Topics like external trends, opportunities, and emerging challenges often surface divergent views. Executives, immersed in day-to-day operations, may underestimate the board's desire to explore these themes at length.

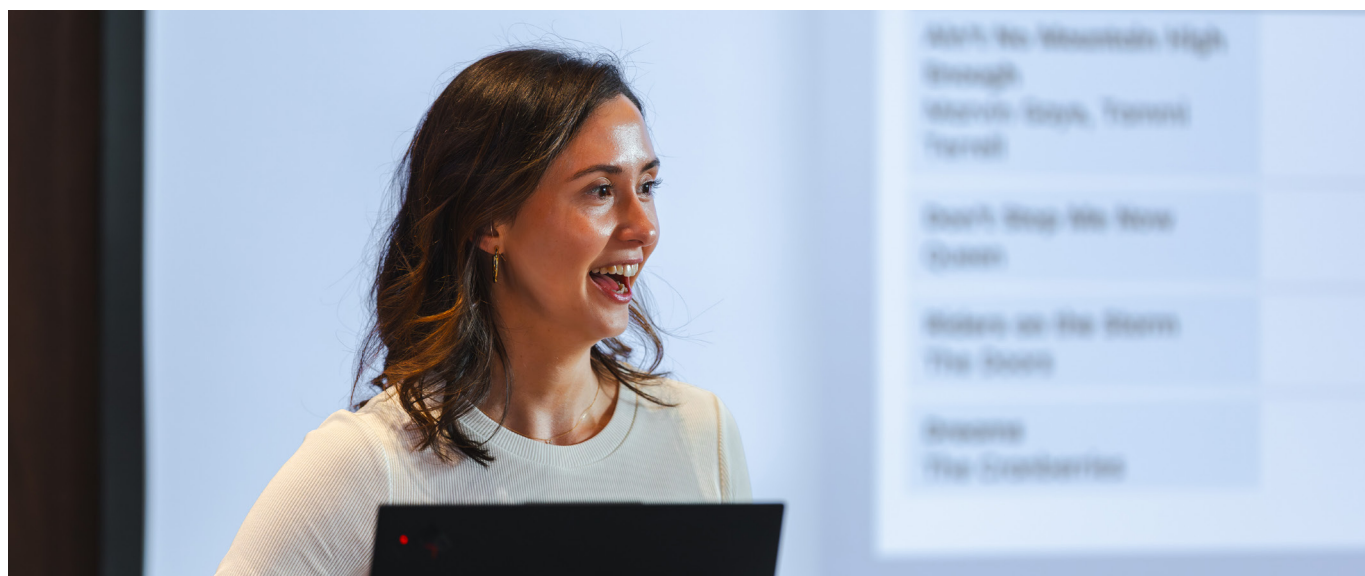
This diversity in perspective can, if harnessed well, enrich strategic dialogue. At one of our financial services clients, for instance, directors brought distinctly different 'entry points' to strategy: one emphasised industry analysis, another leaned on long-term actuarial projections, and a third focused on articulating strategic intent. Rather than forcing convergence too early, we encouraged the board to embrace this diversity, turning it into a source of strategic richness, not confusion.

Agenda design and planning

Well-designed BSDs orient directors to the organisation's strategic context and planning rhythm. Key questions often addressed upfront include: What is our current strategy? How do we approach, set, and monitor strategy? Where are we in the strategic planning cycle? How appropriate is our current strategy in light of evolving conditions?

Rushing through a packed agenda is a common pitfall. Most BSDs we facilitate feature three or fewer formal presentations. The majority of time is intentionally allocated to structured group discussions and collaborative exercises, supported by thought-provoking pre-reading materials. Directors value sessions that allow for substantive, unharried conversations. This can feel uncomfortable for management, but needn't, when planned intentionally.

Directors can get frustrated if they feel overly 'managed' or circumscribed by management. Chairs always, and directors generally, want to be (at least) consulted about a BSD, its objectives, agenda, and expected outcomes; often, they want decision rights.



At one client, board members had become increasingly frustrated with 'presentation-heavy' BSDs. They sought more time to contribute to discussions on external shifts and strategic priorities. We responded by co-designing a fresh agenda, ultimately dedicating more than half the session time to interactive group dialogue.

Group dynamics and facilitation

Boards function best when BSDs create a co-creative and collaborative space, which recognises the limits of directors' role without being circumscribed by overly rigid distinctions between management and board responsibilities. In our experience, small-group exercises that bring directors and executives together to prioritise strategic initiatives are among the most impactful BSD activities. These sessions provide directors with greater insight into operational realities, while giving executives a clearer understanding of board perspectives.

While some directors may initially express reluctance toward small-group work, these activities are often highly valued when they are purposeful and well facilitated. They can create opportunities for more focused, candid dialogue and lead to stronger collective insights.

BSDs are demanding for participants, often requiring sustained attention, complex decision-

making, and collaborative engagement over several sessions. To make the most of directors' time and energy, it's essential to design sessions that are not only effective in meeting strategic objectives but also stimulating and engaging—enabling participants to give their best throughout the day.

Effective facilitation goes beyond structuring activities; it also requires attentiveness to how individuals engage within the group. For example, not all directors will feel comfortable contributing in the same way, and some may participate less vocally even when they hold valuable perspectives. Moreover, facilitators should be cautious not to mistake silence for consensus. Creating deliberate space, and having a structured plan for drawing out less vocal directors, can enrich the quality of discussions and reduce the risk of groupthink.



When carefully designed and skilfully facilitated, BSDs can move beyond routine check-ins to become catalytic moments for strategic clarity and alignment. By focusing on context, design, and dynamics, organisations can unlock the full potential of BSDs—enabling boards and executives to think more boldly and act more cohesively in service of long-term success.



Want to know more?

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