

The image features a large, multi-paned window with a dark wood frame. The view through the window shows a lush green forest with tall trees and a body of water in the distance. Overlaid on the right side of the image are several large, overlapping geometric shapes in shades of orange, blue, and green. A semi-transparent white box is positioned in the upper left quadrant of the window, containing the text "Leadership Retreats" in a bold, white, sans-serif font.

Leadership Retreats



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I am Matthew Riley, presently serving as the VP of Enterprise Solutions at Chick-fil-A Noblesville. Allow me to take you back to the time when I was Director of Business and Culture at Chick-fil-A Saxony & I-69 in 2017. Our story unfolds in those pivotal moments when Saxony (5 years before Multi-Unit) operated as a \$5 million stronghold, manned by a dynamic team ranging from 60 to 80 members and overseen by four dedicated directors. However, there was an unmistakable void in our purpose statement, with only half of the director team capable of reciting it in its entirety. The question of our existence and the blueprint for our operations beyond the immediate horizon remained unclear. Our Operator, Sam, held a trove of ideas about where the store should be, but corralling the collective vision proved to be a formidable challenge for the director team.

My arrival brought with it a wealth of experience in team building and group dynamics, honed through years of managing camps, conference centers, and university dining programs. It was abundantly evident that without a shared, crystalline vision embraced by our entire team, our store's success would remain tethered to Chick-fil-A's overarching brand triumphs. Thus, I embarked on a mission to convince Sam of the necessity for a director retreat—an opportunity to craft this shared vision, formulate a strategy to engage our team, and catapult our store into a prosperous future. Sam, though initially apprehensive due to his past encounters with retreats, put his trust in me. He recognized my unwavering belief in the transformative potential of this endeavor.

With the blueprint of our retreat in mind, I diligently crafted an agenda that would guide us towards our shared vision. My research into Chick-fil-A's internal resources led me to a revelation: Tim Tassopoulos had recently divulged the corporate team's journey in developing Chick-fil-A's Business Framework. Drawing inspiration from this process and weaving in insights from my own rich experience, I fashioned our retreat. In the ensuing pages, I shall guide you through the moments we shared and the roadmap we followed during that seminal director retreat. You may find aspects that necessitate customization for your team, and I encourage such adaptations. For example, during our retreat, it became apparent that our Business Framework no longer harmonized with our existing Purpose Statement. We recognized the need to craft something that would align better with the new trajectory of our store. This was an unforeseen juncture, unplanned in our schedule, but indispensable nonetheless. So, we flexed our agenda to accommodate this pivotal discussion.

In the ensuing years of our journey guided by the Business Framework structure, a realization gradually dawned upon us. While this framework had served us well, it became apparent that we needed something more dynamic. Our Framework seemed to remain static from year to year, requiring little more than a cursory review to acknowledge the persistent challenges and opportunities. The primary focus for updates lay in the goals we would set for the forthcoming year.

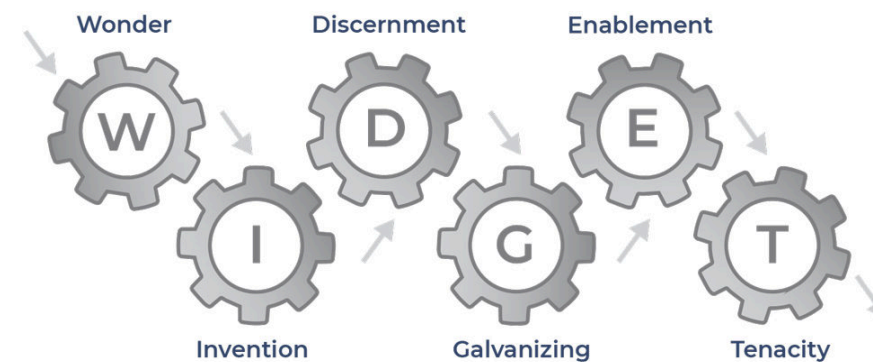
Our quest for a more adaptable approach led us to explore the Working Genius Model by the Table Group after a visit to another Multi-Unit Operator Team. We harnessed the power of the WIDGET model to reshape the structure of our retreats. In one particular year, we divided our team into groups, each composed of individuals with strengths corresponding one of the working geniuses. For example, during the "Wonder" segment, only those leaders who possessed "Wonder" as a Working Genius were present. While this approach had its merits, it unexpectedly unveiled a disconnect between the different groups, most notably between the days of "Invention and Discernment" and "Galvanizing and Enabling."

In response, the following year, we embraced a more unified approach. We encouraged everyone to participate throughout the entire process, even when discussions veered into areas that weren't their genius strengths. By immersing themselves in these discussions, team members gained a holistic understanding of the process, enabling them to contribute more effectively when the conversation aligned with their particular genius.

Now, as a multi-unit organization, we've adapted this methodology to suit our broader structure. Our senior leadership team embarks on retreats that address organization-wide challenges and establish the guiding principles for the director teams. Subsequently, members of this senior team lead day-long retreats for each of our organizational units. These retreats follow the WIDGET model, allowing us to define unit-level goals that align with our Organizational Mission and Vision.



to



Business Framework

Our inaugural director retreat revolved around the paramount task of crafting our Business Framework. This foundational step was imperative as we needed to comprehend our identity and the raison d'être of our business before charting the course for our restaurant's future. The process of creating your Business Framework, as illustrated in the guide I've developed below, is remarkably straightforward.

It commences with a series of probing questions designed to unveil the current state of your business and your aspirations for the future. These questions serve as the cornerstone upon which you'll gauge the alignment of your existing Purpose and Values with the challenges and opportunities your business confronts.

Once your Business Framework takes shape within the purview of your senior leadership, the next phase entails discerning your onward journey and pinpointing where to channel your energies. Depending on the state of your Business Framework, you may need to engage a broader spectrum of team members, possibly through surveys, to refine certain elements, such as your core Values. This is also the stage where you set your Working Goals — the two or three pivotal objectives that will absorb significant resources to yield tangible results. These goals act as a navigational beacon, charting your business's trajectory over the ensuing year.

The ultimate leg of this journey, although challenging, is perhaps the most critical. Here, you embark on the mission of devising a plan to disseminate your Business Framework throughout your entire team. Every member of your organization must grasp the "Why?" behind your Business Framework. Without a lucid explanation of its purpose, rallying your team to align with your vision becomes an arduous uphill battle.

In addition to the Business Framework deliberations, consider the unique needs of your leadership team and any specific topics that warrant discussion. For example, during our inaugural director meeting, we found ourselves at a crossroads following the departure of several directors. We needed to rediscover our collective identity without these influential personalities. To foster team cohesion, I curated various team-building activities. We embarked on a thrilling zip-line adventure through the woods, engaged in spirited board game sessions, and even captured a timeless group photograph reminiscent of days gone by. While these moments may have seemed like mere fun, they were intentionally designed to forge stronger bonds among us, fostering shared experiences and hearty laughter. This camaraderie-building element has endured through subsequent retreats, especially our tradition of playing board or card games late into the night. I urge you to discover a unique bonding experience for your team, one that transcends time and personnel changes, as it possesses the remarkable ability to bridge gaps and fortify your team's cohesion over the years to come.

Why are we
in business

Challenges

Opportunities

Goals

Purpose
and Values

What is Our Business Framework

Why are we in business

"Why are we in business?" This straightforward question will spark a chorus of diverse responses from your team. Some will emphasize profit, others community enrichment, and some the pursuit of excellence. Each viewpoint had its merit, with no wrong answers at this stage.

As you note these responses, patterns will begin to emerge. Certain themes will repeat, representing shared values and objectives. Hopefully, they resonated deeply with your team and form the core of your mission.

Amidst these themes, some responses won't align with your current business reality. However, they still hold value as aspirations for your future direction.

In this reflective moment, don't just define your purpose; you should start charting a course forward. Use this diversity of perspectives to refine your understanding of why you exist. Uncover shared themes that will guide you and embrace aspirations to fuel your future journey. This exercise will lay the foundation for your Business Framework, aligning all of you with a clearer, more profound sense of purpose.

Challenges

Challenges, the crucible where businesses are forged, come in many forms. Some are tangible, their impact quantifiable, while others lurk in the shadows, more nebulous yet equally significant. We, as stewards of our enterprises, must confront them head-on.

The numerical challenges are the ones that leap from spreadsheets and reports. Perhaps a brand-new concert venue is poised to open just a stone's throw away, a looming presence that demands we maintain a specific profitability standard over the next two quarters. These challenges demand strategic agility and a nimble response.

Then there are the less defined, yet no less potent challenges. It could be the undercurrent of an uninspiring culture within our business, a challenge that corrodes morale and productivity. Alternatively, it might be the relentless momentum of unanticipated growth, showing no signs of slowing, which strains our resources and demands astute management.

As custodians of our business, we understand our community and operations intimately. We can anticipate many challenges, but we must also acknowledge the unpredictable. Events like the onset of COVID-19, natural disasters, or civil unrest, although uninvited, can shatter the status quo in an instant.

Our list of perceived challenges is a testament to our acumen, reflecting our commitment to preparing for the known and respecting the uncertainties of the unknown. It's in this crucible that we forge the resilience and adaptability needed to navigate the ever-evolving landscape of business.

Opportunities

Within the intricate tapestry of business, we often encounter "Choppertunities," where challenges and potential intersect. For instance, as we grappled with the challenge of unprecedented growth, it became an opportunity to expand our business and engage customers in novel ways. Beyond this, we find opportunities in technological advancements, market expansion into new territories, fostering diverse partnerships, enhancing the customer experience, innovating our products or services, embracing sustainability, nurturing talent development, adapting to economic trends, heeding customer feedback, and exploring a global reach. These Choppertunities, when seized with agility and foresight, can propel us toward new horizons of success.

What is Our Business Framework

Goals

Let's delve into the process of setting your organization's goals, both short-term (1–2 years) and long-term (3–5 years), with the understanding that these objectives should be both ambitious and attainable. In this brainstorming phase, you'll generate a comprehensive list, keeping in mind the accomplishments you hope to achieve, driven by the challenges and opportunities at hand. It's vital that these goals are not only clear but also realistic, as they will guide your efforts.

As you proceed, you'll meticulously evaluate your discussions thus far, refining your lists and determining where to focus your energies. You'll distill your purpose, identifying the essence of why you're in business. You'll discern which challenges and opportunities will exert the greatest influence on your upcoming year in business. Finally, you'll shape your goals, differentiating between those suitable for the short term and those more aligned with your long-term vision. Some may need to shift, overlap, or even be removed entirely as you fine-tune your direction. This process ensures that your goals are not merely aspirations but actionable roadmaps, setting you on a path to success.

Purpose and Values

Defining our purpose, the heart of our business, is an essential step in building our Business Framework. To begin, we need to assess whether our business already has a Purpose Statement (Mission Statement) or a guiding concept that informs our decisions and identity. If we don't have one, it's time to embark on the journey of creating one. If we do, we must scrutinize it through the lens of our discussions so far, determining if it aligns with the Business Framework we've defined. If it does, we've laid the foundation for the next year. If not, it's time to reevaluate our purpose statement.

Creating or refining Purpose Statements may seem daunting, but at its core, it's about answering the fundamental question: "Why are we in business?" It's not just about the product we sell but what we can achieve because of it. A compelling Purpose Statement should inspire, rallying people behind it with a shared vision. It must be something we can uphold daily to build trust.

To embark on this journey, we start by examining our list of reasons for being in business. What excites us the most? What stirs our passion and inspires action? We find that one core element and subject it to rigorous debate to ensure it truly reflects what we want to stand for every day. It's the filter through which we make decisions.

Then, we craft a statement that encapsulates this inspiration and passion. It must be specific, concise (a sentence or two at most), and crystal clear. A Purpose Statement loses its impact if it's vague or easily misunderstood. It should be something we can proudly display and live by, a beacon that guides us in our journey.

Providing Focus

After establishing our Business Framework, it's crucial to revisit it with a discerning eye to ensure clarity in all aspects. We should scrutinize every element to make sure it aligns with our vision and purpose. Once we've achieved this clarity, the next step is to identify the top 2-3 business improvements that will become our Working Goals for the next year. These goals will serve as our focal points, directing our resources and efforts for the greatest impact.

Selecting these Working Goals requires a strategic mindset. We must determine which objectives will yield the most substantial benefits or set us up for long-term success. It's about making choices that align with our vision and enhance our competitive position.

Once we've pinpointed our Working Goals, the next phase involves developing a detailed plan to achieve them. This plan should outline the action items we'll undertake over the next year to support each goal. We must establish clear metrics and criteria for success, defining how we will measure progress and achievement.

It's equally important to delve into the "how" and "why" behind each goal. Understanding the rationale and the steps required for success is essential for effective execution. Additionally, we should create a system for tracking progress. A visual tool that the entire team can access and reference can be highly beneficial in keeping everyone aligned and motivated.

As we refine our plan and feel confident about its clarity and feasibility, we can move forward to implement and execute it, knowing that it serves as our roadmap to success for the upcoming year.

Facilitating the phase of Providing Focus in the business framework creation process is about guiding the team toward selecting the most strategic Working Goals for the year ahead. As a facilitator, your role is to foster a structured and transparent discussion. Encourage team members to critically assess each element of the Business Framework, ensuring alignment with the organization's vision and purpose. Employ techniques such as SWOT analysis, brainstorming, and group discussions to help identify the top 2-3 Working Goals. Emphasize the importance of strategic decision-making, where objectives are chosen based on their potential to yield substantial benefits or enhance the organization's competitive position. Additionally, guide the team in developing a comprehensive plan for each goal, defining clear action items, success metrics, and a tracking system. By facilitating this process effectively, you ensure that the selected Working Goals become the team's focal points, driving focused efforts and resources toward achieving them in the year ahead.



Ensuring Alignment



The final step in this process is an ongoing commitment to enhance how we engage and connect with our team, ensuring they embrace the Business Framework (BF) and Working Goals (WG). Central to this effort is cultivating a sense of ownership among team members so that they actively contribute to WG success. To achieve this, we begin by clearly explaining the "why" behind our business focus, helping individuals understand the purpose and significance. Identifying key champions within our team can serve as influential advocates. Customizing our communication methods to accommodate various learning styles is essential, as is creating visual tools to simplify complex concepts. Regular updates, interactive workshops, and storytelling are valuable tools to keep the team engaged and informed. We establish feedback mechanisms, encouraging input and suggestions, and secure leadership support at all levels. Consistency, simplicity, and clarity in our messaging are vital, as is mobile-friendly communication. Ultimately, the goal is to engage the team early by demonstrating the relevance and impact on their daily work, recognizing that in today's information-saturated world, capturing attention and maintaining engagement is an ongoing challenge requiring adaptability and understanding of individual preferences and needs.

Facilitating the phase of Ensuring Alignment in the business framework creation process is a critical endeavor that involves empowering the entire organization to embrace the shared vision, mission, and Working Goals. As a facilitator, your role is to guide the team in exploring innovative and effective methods to foster alignment and engagement among all team members. Encourage open discussions and brainstorming sessions to generate a comprehensive list of strategies. Start by emphasizing the "why" behind the Business Framework and Working Goals, helping participants understand the purpose and relevance to their roles and the organization's success.

Identify and nurture champions within the team who can passionately advocate for the framework and goals. Tailor communication methods to accommodate diverse learning styles, ensuring that the messaging resonates with everyone. Explore the creation of visual tools and resources that simplify complex concepts and make the framework accessible to all. Discuss the implementation of regular updates, interactive workshops, and storytelling sessions as engaging methods to inform and educate the team.

Establish feedback mechanisms to encourage input and suggestions, allowing team members to actively contribute to the alignment process. Emphasize the importance of leadership support at all levels of the organization to set an example and reinforce the commitment to alignment. Consistency, simplicity, and clarity in messaging are essential principles to follow, ensuring that the framework and goals remain accessible and comprehensible. Recognize that in a world inundated with information, adaptability and consideration of individual preferences and needs are paramount for sustaining engagement. Facilitating this alignment phase requires a creative and empathetic approach to mobilizing the entire organization toward a common purpose.





WIDGET



In this scenario, where the "Why" of the business remains unchanged and the challenges and opportunities are consistent with the previous year, the focus shifts to setting and revisiting goals. This process may involve the CEO or a group of high-level leaders who aim to maintain the same mission and vision after reviewing the Business Framework. The CEO may express the overarching goal for the entire organization, but the responsibility for determining how to achieve it falls on individual departments.

This is where the WIDGET model comes into play, serving as a valuable tool for creating a comprehensive plan. The model guides the problem-solving process, from idea development to implementation within teams and the organization as a whole. In the following pages, we will delve into each step of the WIDGET model, equipping you with the skills and tools needed to facilitate this process in your own meetings. This structured approach ensures that teams can efficiently address challenges, align with the organizational vision, and work collaboratively toward shared goals.



Wonder

Invention

Discernment

Galvanizing

Enablement

Tenacity

WIDGET



The "Wonder" genius is characterized by curiosity and a penchant for asking questions. During a strategic planning session, individuals with this genius play a crucial role in exploring new possibilities and pushing the boundaries of conventional thinking. For example, imagine Matt Riley, with his "Wonder" genius, actively participating in the session. He might ask questions like, "Have we fully considered all potential challenges and opportunities in our market?" or "What if we expanded our organizational mission to encompass new initiatives beyond our current focus on Chick-fil-A restaurants?"

Individuals with the "Wonder" genius bring a sense of boundless curiosity to the team. They foster an environment where asking questions and exploring new ideas are not just encouraged but celebrated. Their role in strategic planning is to ignite creativity, pushing the team to consider unconventional solutions and uncover hidden opportunities.

As a facilitator, encourage participants to embrace their natural curiosity. Start the session by posing open-ended questions to stimulate wonder and creativity. Create an environment where it's safe to explore unconventional ideas and perspectives. Encourage participants to ask "what if" questions and push the boundaries of conventional thinking. Foster a culture where wonder leads to the discovery of new possibilities.

The "Invention" genius excels at brainstorming and generating creative solutions. In a strategic planning session, this genius is instrumental in generating innovative ideas and approaches. In Matt's team, someone with this genius might propose unique strategies for expanding Chick-fil-A's reach or creating novel marketing campaigns. They might suggest creative solutions to address challenges like evolving consumer preferences.

The "Invention" genius is the creative force that propels brainstorming sessions. They excel at generating fresh ideas and innovative approaches. Their contributions infuse strategic planning with a sense of creativity, opening doors to novel solutions and ensuring that the team doesn't settle for the status quo.

Facilitate brainstorming sessions that harness the creative energy of the "Invention" genius. Use techniques like mind mapping, ideation exercises, and open forums to generate a wide range of innovative ideas. Encourage participants to think beyond the obvious and explore unconventional solutions. Create a non-judgmental atmosphere where every idea is valued and discussed.



The "Discernment" genius is skilled at analyzing options and evaluating their feasibility. During the strategic planning session, individuals with this genius help the team make informed decisions. For instance, when discussing potential goals or initiatives, someone with "Discernment" might meticulously assess the risks and benefits, providing valuable insights into the viability of each idea. They could analyze past data to determine which goals align best with the organization's capabilities and resources.

Those with the "Discernment" genius provide a critical analytical perspective during strategic planning. They excel at evaluating options and identifying the most promising paths forward. Their contributions help the team make informed decisions, ensuring that chosen goals are well-considered and align with the organization's capabilities.

Guide participants through a process of critical analysis and evaluation. Provide frameworks and tools to help them assess options objectively. Encourage participants to examine the pros and cons of different strategies. Facilitate discussions that lead to informed decisions. Help the team prioritize ideas and select the most viable ones based on data and careful consideration.

The "Galvanization" genius has the ability to rally others and inspire action. In your strategic planning session, individuals with this genius play a vital role in motivating the team to commit to the chosen goals. For instance, let's say Matt, with his "Galvanization" strength, passionately conveys the importance of achieving a specific Working Goal. He might inspire the team by sharing a compelling vision of how it aligns with Chick-fil-A's mission and how their efforts can make a meaningful impact on the organization's success.

The "Galvanization" genius is the team's motivational powerhouse. They possess the ability to rally team members, inspiring them to take action. In strategic planning, they play a vital role in instilling a sense of purpose and urgency, driving the team toward the chosen Working Goals with passion and enthusiasm.

As a facilitator, inspire and motivate the team to action. Set a tone of enthusiasm and purpose from the outset of the session. Share compelling stories and examples that ignite passion. Use persuasive communication techniques to rally participants behind the chosen goals. Encourage them to share their own visions and inspire each other with their commitment.

The "Enablement" genius excels at planning and organizing. During the strategic planning session, individuals with this genius ensure that the chosen goals are transformed into actionable plans. For example, within Matt's team, someone with "Enablement" strengths could develop a detailed project plan outlining the specific steps, responsibilities, and resources required to achieve a Working Goal. They would ensure that everyone knows their role and that the project is executed efficiently.

Individuals with the "Enablement" genius bring structure and organization to strategic planning. They excel at turning ideas into actionable plans, ensuring that the team has a clear roadmap for execution. Their contributions guarantee that the chosen goals are translated into practical steps and that everyone knows their role in achieving them.

Facilitate the transition from ideas to action. Help participants transform strategic plans into practical steps and clear action plans. Create structured frameworks, timelines, and accountability mechanisms. Ensure that every participant understands their role in executing the chosen goals. Guide the team in developing efficient workflows and resource allocation.

The "Tenacity" genius excels at persevering through challenges and obstacles to achieve desired results. During a strategic planning session, individuals with this genius bring a strong commitment to seeing projects through to completion. In Matt Riley's team, someone with "Tenacity" strengths would play a crucial role in ensuring that the WG are not just discussed but executed effectively.

The "Tenacity" genius embodies persistence and determination. They are the driving force behind project completion. In strategic planning, their commitment to pushing through challenges ensures that the chosen Working Goals are not just discussed but executed effectively. Their follow-through is instrumental in achieving long-term success.

Encourage a mindset of perseverance and determination throughout the session. Remind participants that achieving strategic goals often requires overcoming challenges and setbacks. Emphasize the importance of follow-through and commitment to long-term success. As a facilitator, provide guidance on problem-solving and resilience when obstacles arise. Foster a culture of accountability and resilience.

In this strategic planning context, these geniuses work together harmoniously. "Wonder" sparks creative thinking, "Invention" generates ideas, "Discernment" evaluates them, "Galvanization" motivates the team, "Enablement" translates ideas into actionable plans, and "Tenacity" ensures that the work gets done. This collaborative approach ensures that the BF and WG are not just theoretical concepts but actionable roadmaps that leverage each team member's strengths for the benefit of your organization's success.



The art of strategic planning, coupled with the development of a robust business framework, is the cornerstone of organizational success. By harnessing the power of the Working Geniuses and following the steps outlined in this guide, you have acquired the essential tools to lead your team toward a future filled with purpose, innovation, and achievement.

Remember that strategic planning is not merely an academic exercise but a dynamic journey that continually shapes your organization's destiny. Embrace your role as a facilitator, guiding your team to unlock their potential, set clear goals, and translate vision into tangible results.

The development of a comprehensive business framework, as detailed in this guide, is the blueprint that transforms your vision into action. It provides the strategic clarity and direction needed to navigate the complex business landscape effectively.

If you find that you and your team require external expertise or a fresh perspective to facilitate your strategic planning sessions or to craft a robust business framework, remember that Matt Riley, the founder of MFR Strategies, stands ready to assist. With years of experience and a proven track record, Matt offers comprehensive facilitation services and framework development to help you and your company chart a course for sustainable growth and success.

To inquire about Matt's services or to explore further resources on strategic planning and business framework development, please visit [MFR Strategies](#). We eagerly anticipate the opportunity to partner with you on your journey toward organizational excellence.

Thank you for choosing this guide, and may your strategic planning endeavors, coupled with a strong business framework, lead to a future defined by vision, growth, and remarkable achievement.

