

**Customer**

Trans Associates Engineering Consultants

Industry

Civil Engineering Consulting Firm

Location

Robinson Township, Pennsylvania

Engagement

Strategic Planning Meeting
Facilitation

About This Engagement

Organizations of all sizes need to plan for the future, particularly in times of growth or decline. Relying on internal voices to objectively lead these important discussions can be a difficult, if not impossible, task. Engaging a trusted third-party to facilitate the discussion is often essential to the overall success of this important planning session, which is critical to the future success of the company. Contact Step 1 to find out how they can help your company to plan and conduct a meaningful Strategic Planning Meeting.

Trans Associates Turns to Step 1 to Help Map-Out its Strategic Vision

Trans Associates Engineering Consultants, Inc. is a successful civil engineering consulting firm specializing in transportation solutions for public and private sector clients. Since its founding in 1989, the company has experienced substantial growth and now has over 70 employees in offices across 3 states. Trans Associates prides itself on providing high quality services across a broad spectrum of projects including transportation planning, traffic engineering, roadway design, traffic signal system design, and parking consulting.

So when it came time to update the firm's own business roadmap, Trans Associates turned to Step 1 Management Systems to facilitate its annual Strategic Planning Meeting and help its management team to establish a Vision Plan for keeping the firm on-course for continued growth and success.

Getting Started

Trans Associates first met Jeff Canter, President of Step 1, when the firm's Human Resources manager attended a Step 1 management training seminar. With its expanding business and increasing number of associates, the Trans Associates is familiar with the typical challenges facing new and developing managers. The material presented at the Step 1 seminar was pertinent to their work environment, so Trans Associates arranged to bring the seminar on-site in a specialized workshop setting to reach a broader audience of its managers. After the success of the on-site training session, company executives invited Jeff to work with them as a facilitator for their upcoming Strategic Planning Meeting.

"As we headed into the process of planning our annual meeting, we did so against the backdrop of significant growth in a diverse set of markets," said Carl Hunt, business development manager at Trans Associates. "In the upcoming meeting we wanted to take a look at the long-term business prospects for continued growth in these diverse areas, but we recognized that with so many factors at play this would be difficult to accomplish if we did not bring in a third-party to objectively lead the discussion. It worked well for us to get to know Jeff first through his on-site training engagement. The success of that session demonstrated to us his ability to strategically and pragmatically lead our upcoming planning session."

The Service Engagement

Step 1 worked with Trans Associates to develop a customized service package that would meet the engineering firm's goals for the Strategic Planning Meeting. Step 1 met with the company's executives charged with planning the event in order to identify their objectives for the session. Step 1 then developed a service package that not only provided them a trusted third-party to lead the discussion, but also included additional consulting services to meet other identified requirements for the session.

“Having a third-party involved in this planning meeting was absolutely critical... People felt good about their input being heard, and being actively involved in this important discussion. We are very pleased with our decision to work with Step 1, and I'd absolutely recommend Step 1 to other firms seeking a third-party to work with on strategic planning and management training issues.”

Carl Hunt

Business Development Manager
Trans Associates Engineering

About Step 1

Step 1 Management Services helps companies to grow by reconnecting them with their core competencies and by training and mentoring their new managers for success. Step 1 has expertise in strategic business planning, management training and mentoring, business operations analysis and strategic technology planning. Jeff Canter, President of Step 1, has over 25 years of experience in enabling businesses to realize more of their full potential. Jeff applies pragmatic, real world experience to solve tough business problems.



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The scope of the Strategic Planning Meeting Facilitation service package developed for Trans Associates comprised of five components:

- ◆ Pre-Meeting Planning
- ◆ Survey Development & Information Gathering
- ◆ Analysis of Survey Responses & Presentation of Findings
- ◆ Meeting Facilitation
- ◆ Post-Meeting Summary

Executives identified as their primary goal for the session to be the creation of a Vision Plan – a long-term strategic roadmap that would lead the company through its next phase of growth and change. To accomplish this, Step 1 and Trans Associates determined that a pre-meeting survey of meeting participants – key business managers across the firm's different business groups and geographic markets – was essential to securing critical and forthright feedback. Step 1 developed a survey designed to solicit valuable feedback and input for the meeting's SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis.

In addition to leading the discussion, and helping to keep it on-track, Step 1 performed valuable up-front information gathering and analysis to present during the session, which contributed to the overall success of the meeting.

The Results

“Having a third-party involved in this planning meeting was absolutely critical,” said Carl Hunt. “The meeting was a success. Jeff did a great job facilitating the discussion; he was respectful, encouraged input and listening, and did a great job keeping the group focused and on-task. People felt good about their input being heard, and being actively involved in this important discussion.”

Through the course of the session, it became clear to the Trans Associates team that before they could come to agreement on the Vision Plan they first had to develop consensus on a number of key foundational business issues. With Step 1's facilitation, the executives and managers were able to identify these critical issues, and developed specific action items to be addressed in follow-up to the meeting. The group came to the conclusion that without first addressing these open items, any developed Vision Plan would fall short of their needs.

“As any company goes through a time of growth, there will be a lot of changes. Change is good, but it can also be difficult. For Trans Associates, this strategic planning session came at a critical time as we determine where we have been, where we are now, and where we are headed. Although we didn't leave the room with the Vision Plan nailed down, we made great progress towards developing a plan that is both actionable and meaningful – not just words on paper. Jeff's facilitation was essential to the progress that was achieved. And, we're confident that the action items that we identified are a necessary first-step to developing a winning Vision Plan for the company.

“In addition to his leadership during the meeting, Jeff's upfront information gathering, analysis and presentation, coupled with his post-meeting analysis and summary provided us with valuable insights and intelligence on our business. The information was presented clearly and concisely. These aren't documents that we'll put on the shelf. We will continue to derive value from them as we refer to them again and again.

“In all, we are very pleased with our decision to work with Jeff, and I'd absolutely recommend Step 1 to other firms seeking a third-party to work with on strategic planning and management training issues,” concluded Hunt.