



**Entrepreneur  
& Family**  
BUSINESS COUNCIL

# Strategy & Innovation

Strategy sets direction  
Innovation keeps it alive.



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## Presenter Intro

For almost 30 years, Patty has been a marketing strategist and writer in a variety of roles. With experience in both agency and client settings, she has the perspective of both sides of the desk.

Patty has worked with a wide range of clients and teams from entrepreneurial start-ups to multi-national corporations spanning a variety of industries including steel, chemical, tech, distribution, financial and professional services, and B2C products.

She has the ability to not only focus on the core of a business but recognize what makes it exceptional. Her strategic approach teaches clients how to communicate their unique qualities while ultimately driving growth and sales.





# Why Strategy Matters

**ALIGNMENT**

**FOCUS**

**PRIORITIZATION**

# What a Strategic Plan Is and Isn't

Long-term roadmap that sets the direction of your business.

Defines what you're building, what you need to focus on to get there, and how you'll measure progress along the way.

It is the bridge between your vision (why you exist and where you're going) and your day-to-day operations (how you run the business).

**≠ Go-to-Market**

**≠ Mission/Vision/Values**

**≠ Annual Operating Plan (AOP)**



# Foundations of a Strategic Plan

**Vision | Mission | Values**

**Focus Areas (Pillars/Themes)**

**Goals → Strategies → Tactics**

**KPIs & Metrics**

**Resources & Timeline**

**Monitoring & Adjustment**



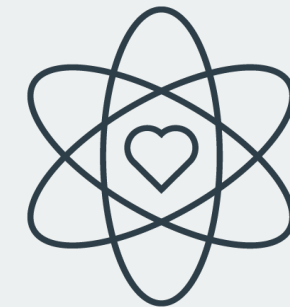
# Vision, Mission, Values



**VISION**  
WHERE ARE WE  
GOING?



**MISSION**  
WHY DO WE  
EXIST?



**VALUES**  
HOW DO WE  
BEHAVE?

# Strategic Focus Areas



# Goals → Strategies → Tactics



**GOALS**  
ARE YOUR WHAT

**STRATEGIES**  
ARE YOUR HOW

**TACTICS**  
ARE YOUR ACTIONS

# How Strategy Becomes Real

A goal without a plan is just a wish.  
And a plan without metrics is just hope.

Milestones

Baseline  
→  
Target

Cadence  
+  
Ownership

Accountability



# Monitoring & Adjustment

## CADENCE

- Monthly; 45 minutes, KPI review and blockers
- Quarterly; 90 minutes, strategy review and reallocation
- One page scorecard, one owner per KPI, one update per initiative

## PIVOT TRIGGERS

- Pre agree what counts as a dig in moment vs a pivot moment
- KPI misses for two periods
- External shocks

## LIVING DOCUMENT

- Set a simple rhythm and stick to it
- Use Stop, Continue, Change format

## COMMON PITFALLS

- Reviewing numbers without decisions
- Changing goals every month, or never changing at all
- Too many KPIs, no single source of truth, unclear owners

# Great Strategies Require External Components

**COMPETITIVE LANDSCAPE**

**CUSTOMER INSIGHTS**

**MARKET/INDUSTRY TRENDS**



# Strategy Development Facilitations

**SWOT**

**NOW-NEXT-NEVER**

**DEATH OF A COMPANY**

**START-STOP-STRENGTHEN**





# SWOT or Death of a Company

## 15-Minute Sprint

**Choose:** SWOT *or* Death of a Company

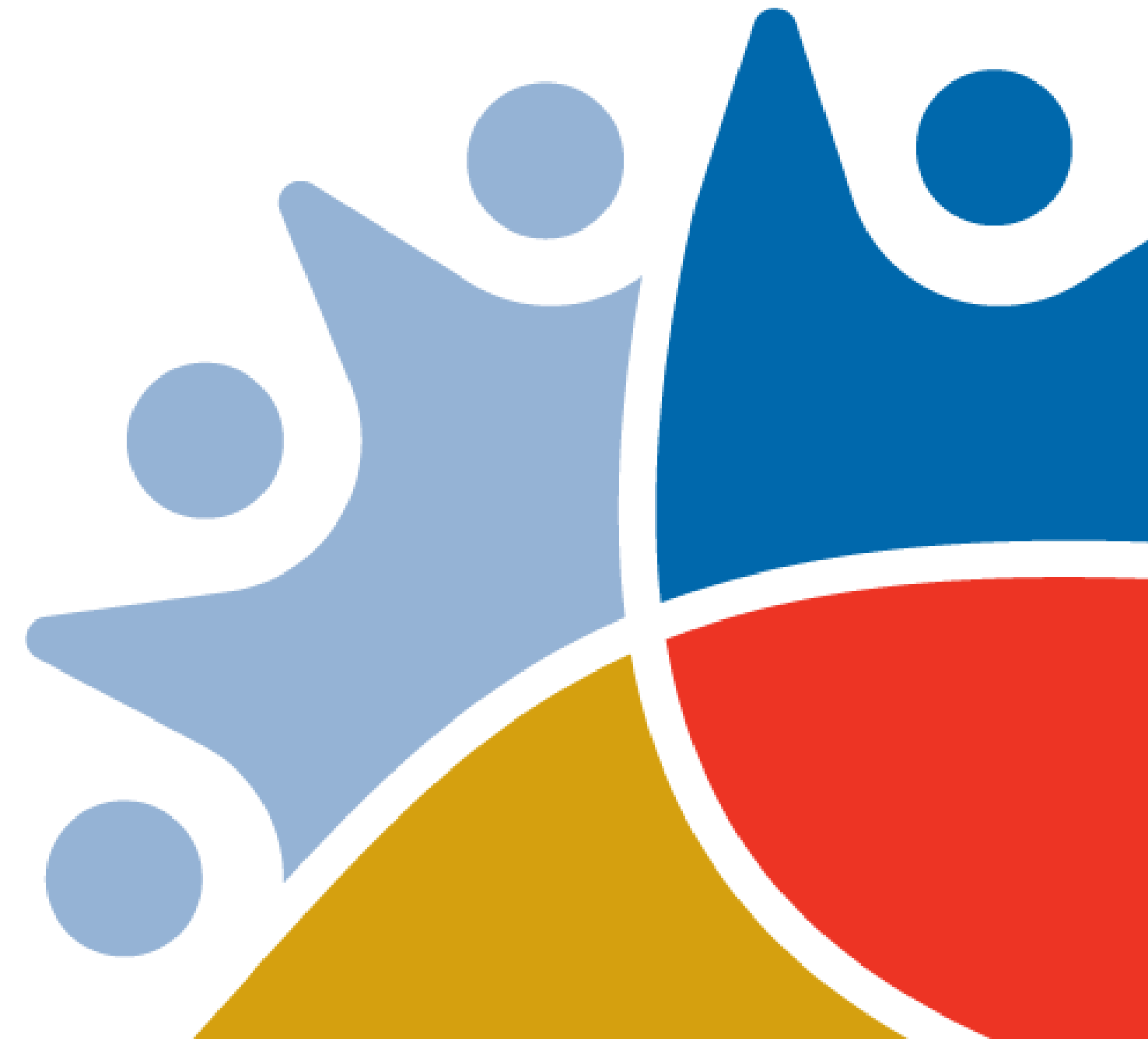
**Task:** Work solo or in pairs

**Output:** 2 themes + 1 risk + 1 action

**Time:** 10 min work → 5 min share

# Once you develop your strategy, how do you make sure it lasts?

*A strategy without innovation  
is just a plan waiting to go stale.*





# What Is Innovation?

Deliberate change that creates new or protected value for customers, the company, or the team, on a repeatable rhythm.

Innovation is fuel. It keeps your business and your team relevant.

“Innovation is saying no to a thousand things.” — Steve Jobs

# What Is Innovation?

## What it **does**:

- ✓ Creates value
  - ✓ Builds capability and energy on the team, not just features
  - ✓ Protects relevance as markets and tech shift
  - ✓ Repeats as a practice, not a onetime event
- 

## What it **is not**:

- ≠ Activity without impact
- ≠ Pet projects that never meet a customer
- ≠ Tech for tech's sake



# Where Innovation Can Be Found

Five places to focus your innovation



# Go To Market Innovation

Change how you find customers and how they buy from you.

## **Sell the same offer to a different type of customer.**

Example: If you sell to factories, try warehouses or hospitals.

## **Identify new paths to reach buyers.**

Example: List on a marketplace, work with a local distributor, or set a referral deal with an installer.

## **Repackage how you sell.**

Example: A starter package for new buyers or a priority package for people who want speed.



## QUESTIONS TO ASK

Who already looks a lot like our best customers?

Where do our buyers spend time before they talk to us?

What would make a buyer say yes today?

# Product Innovation

Make what you sell easier to understand, faster to use, or better at the main job.

## **Remove one confusing step.**

Example: Ship parts preassembled so setup is faster.

## **Add one thing customers already do on their own.**

Example: Include a common adapter or a ready template.

## **Create a fast ship version.**

Example: A standard size or kit that leaves within two days.



## QUESTIONS TO ASK

What do customers do right after they buy that we could build in?

Where do new users get stuck?

If we had to cut delivery time in half, what would we change first?

# Process Innovation

Fix the steps inside your business so the work flows faster and with fewer mistakes.

Provide quotes in one day by using a standard menu, templates or technology.

Create a kit with the most used parts so your assembly team members stop walking back and forth.

Standardize intake with a five-field form so jobs start with all details needed.



## QUESTIONS TO ASK

Where do jobs sit and wait?

What mistake happens most and why?

What would a new hire trip on tomorrow?

# Technology Innovation

Technology is not the innovation. It enables innovation by making good ideas repeatable, faster, and easier for customers.

Show real-time inventory and lead times on your site or a simple portal.

Use QR or barcodes at each step to track parts and document process.

Put simple sensors on critical items (temperature, vibration, fill level) to trigger service before failure.



## QUESTIONS TO ASK

What can a customer do without calling us today, and what's the next step towards self-serve?

Which task repeats daily that automation or AI could start or finish for us?

If volume doubled tomorrow, which step must be automated first to keep up?

# Customer Service Innovation

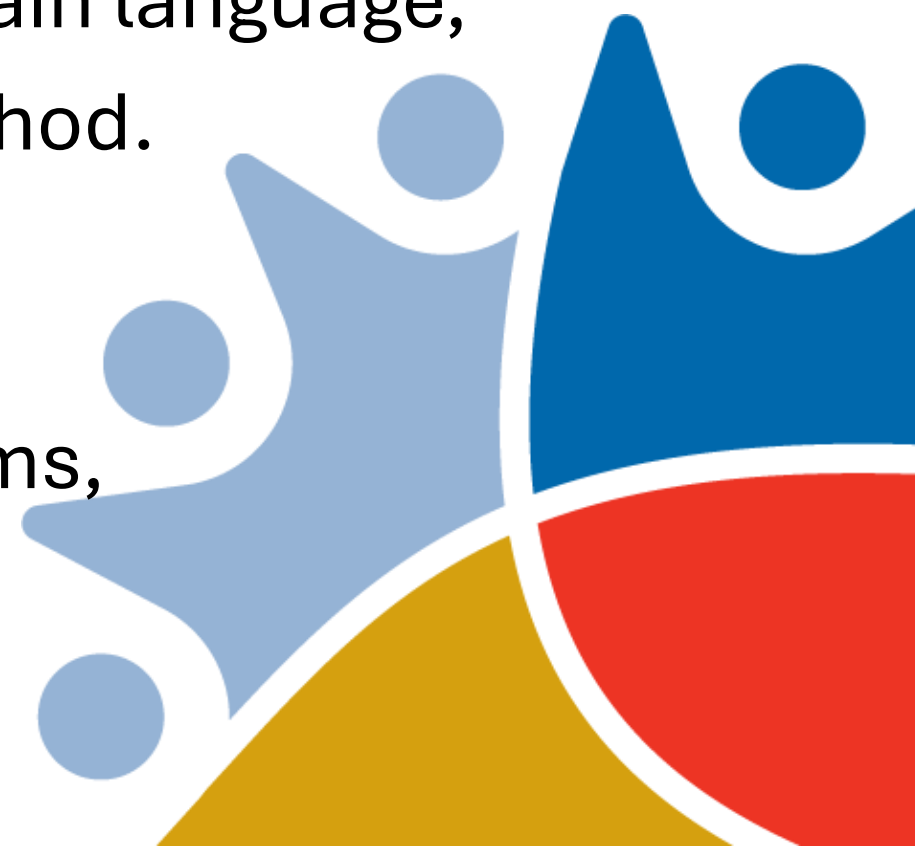
Make it easy to buy, easy to use, and easy to stay.

Show price and lead time up front. Ranges are fine, surprise is not.

Offer a fast start package. Day one win built in, small scope, fixed price.

Simplify billing. One invoice per job, plain language, line items, access saved payment method.

Make reordering effortless. Reorder from past jobs, one click for repeat items, suggested quantities.



## QUESTIONS TO ASK

How easy is it for a customer to buy from us? Where can we remove friction?

How can we save customers time?

When was the last time you got a kudo from a customer? Can you implement that trigger in other places or with other customers?

# Inputs for Innovation



# Voice of Customer

Weekly micro-calls: 3–5 ten-minute chats; rotate new/lost/current customers.

Shadow the work: One ride-along or screen-share per month. Observe, don't participate.

One-question pulse in invoices/portals: “What could we do better?”

Mine what already exists: Tag service tickets, call transcripts, and emails for friction, inputs, requests, common “nice-to-haves”

Close the loop: “You said / We did” update each month to show changes made.



# Problems + Gaps

Bottleneck Map (time-in-stage for every job)

Workarounds Wall (photo or note of every “we just do X” hack)

Handoff Bounce Count (when work comes back, note why)

Missed Promise Tracker (ETAs, specs, scope changes)

Overtime & Queue Heatmap (where work piles up, by day/team)





# Data and Metrics

**Operational Metrics:** Quote turnaround, on-time rate, rework, percentage to spec, returns.

**Leading Indicators:** Queue time, unplanned overtime, “Where is it?” calls.

**Customer Signals:** NPS, renewal timing, repeat order rate, churn reasons.

**Financial Drivers:** Gross margin per job, hours per unit, input costs.

**Expanded Data Sources:** Email threads, call recordings, chat logs, service notes.

# Partners, Vendors, Peer Groups

**Suppliers & Partners:** Quarterly check-in—what’s coming, what’s end-of-life, what’s new in pricing.

**Trade Associations & Peer Groups:** Cadence of connecting for what members have implemented and benchmarks you can “borrow”.

**Regulatory & Standards:** What will force timeline, labeling, safety, or data changes in the next 12 months?

**Talent Market Signals:** Role's competitors are hiring for (skills hint at where the puck is going).

**Macro Triggers:** Lead-time trends, freight costs, energy rates, anything that changes your buyer’s urgency.

**Field Trips & Shop Swaps:** Quarterly visit to a non-competitor with high discipline or innovations you admire.

# Team Ideas

**“What If” Circle (15 min):** Rapid-fire “What if we...” ideas, no debate. Post the top three to the idea backlog.

**Win Walkthrough:** Pick one recent win; walk the steps that worked. Extract one repeatable move and standardize it.

**Time-Thief Snapshot:** One 15-minute audit per week per person: “What stole time?”

**Automation Wish List:** Tasks the team believes software/templates could assist with.

**Knowledge Gaps:** Questions asked 3× in a week → create/upgrade a how-to or template.

# What Leaders Need to Make Innovation Real





# Compression Planning

## **Step 1: Pick ONE**

Go-to-Market · Product · Process · Technology · Customer Experience

## **Step 2: Generate LOTS**

"What could you change, fix, add, or cut in that area? No editing. No debating. No judgment. Blue sky thinking. If an idea seems obvious or dumb, write it anyway. Go."

## **Step 3: Choose ONE**

Choose the one you could test in 30 days using what you already have. Not the biggest idea. Not the most impressive one. The most testable one.

**Output: One innovation area + one idea you could test in 30 days**

# Three Takeaways

Innovation is a habit, not a project.

Strategy sets direction, but innovation keeps it alive

Start small, measure, repeat

**Strategy says choose.  
Innovation says  
explore.**

**You need both.**



# Thank You



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