



black fox
Strategy

Services Portfolio

Strategic Planning

Performance Analysis

Executive Strategy Coaching

Strategic Planning, Analysis & Coaching



**You have so many options when it comes to a strategy coach and advisor.
Here is what makes my approach different.**

Expertise

I specialize in all things strategy – from visioning to performance coaching. My expertise is not bound by industry because it lies in analyzing and designing systems that support the organization holistically regardless of the type of business it is. My clients are the industry experts, I augment that expertise with my own to help identify blind spots that they are often too close to see. There is no shortage of tools, methods, and frameworks for strategic planning but tools and frameworks aren't enough. The formula I use combines Performance Intelligence, Strategy Design and Executive Coaching because it takes all three disciplines to solve strategy. You can find my bio [here](#).

Quantum Intelligent Approach

Management theory has – for far too long – looked at the organization as a predictable, controllable, mechanistic structure. Internal hierarchies aimed at improving efficiency emphasized compartmentalized thinking and valued repetition and output over creativity and adaptive learning. Quantum physics expanded our original understanding of how the universe works, and it is now time to apply that same understanding to the organization by recognizing the dynamic learning, evolving, and often unpredictable complex systems that they are. This understanding and philosophy are woven through everything I do.

Navigating the Evolution Challenge

The Evolution Challenge exists in any turbulent space of change, where complexity begins to trample agility, and the structure of teams, systems, and operational flow increasingly hinder the organic adaptation you need to scale and grow. **This is my specialty.** Your organization moves through stages of growth - it is a natural outcome of success. However, the process of moving from one stage to the next is often painful. Just as whitewater rapids are meant to be navigated, so is this space of change and staying there any longer than necessary will cost you people, customers, and strategic relevance.

Coaching into Powerful Trusting Teams

I recognized some time ago that the best strategy is laid waste when the people part of the equation is ignored. When you put the needs of people at the heart of strategy design, and you make the investment in yourself and the leaders you have at the helm, strategic planning moves from a project event to an active discipline. Relationships govern every aspect of the work that gets done within any organization. Leveraging the inherent dynamics and uniqueness of your team as part of the strategy process builds the kind of authentic conversation, cohesion and strategic alignment you need to succeed.

Things I Know to be True

Information is Power.

Experience informs the way you lead, but even "tried and true" approaches often fail when applied to a rapidly changing or untested environment.

Strategic Planning is not about the Plan.

It's about knowing when the plan needs to change. This requires a strategic thinking discipline that challenges assumptions and creates alignment at every turn. It is an agile thinking discipline that embraces uncertainty for the opportunities it presents.

Organizations are not Machines.

Human-centric complex adaptive systems (i.e. organizations) thrive best when strategy is designed to leverage organic learning and creative problem-solving. Where we find beneficial cause that feeds the entity itself as well as those it serves, we find sustainability.

Purpose, Growth & Evolution exist in Equilibrium.

Regardless of your size, complexity, industry or entity type, success and sustainability require a balanced approach to PGE. It's a quantum intelligence thing.

The Quantum Intelligence + Design + Coaching Formula



My roots run deep in both strategy design and enterprise risk. I have learned that even the most elegant plan will fall short if we don't address the inherent nature of humans and the inevitable complexity brought on by growth.

Intelligence

- What does your market demand?
- What can your organization deliver?
- What do your people need to thrive?

Performance Intelligence is the foundation for strategy design. Diving deep to answer these questions provides the organizational awareness necessary to solve evolution challenges so you can successfully make your next move. You and your team are the experts - my job is to help you challenge assumptions, reveal capability gaps, and break status quo mindset.

What it Looks Like

Depending on the scope and need of the project, this work is designed for various levels of engagement and intensity, ranging from self-assessments, to workshops, to an all-in deep dive with the ESQI 360 analysis.

In this work we identify gaps in alignment, disconnects between strategic intent and actual results, performance that impacts organizational agility, and reveal working risk appetite.

Design

- How do Vision & Values manifest?
- Is the work connected to the Strategy?
- Are you balancing Purpose, Growth & Evolution?

Designing strategy has many layers that run from visioning to risk appetite, and no strategy discipline is complete without all the pieces. While it may seem counter-intuitive, the plan is not the most important outcome of strategic planning. The most important outcome is building the kind of strategic thinking discipline that drives agility. What that requires is the articulation of a compelling vision together with clear strategic imperatives that support the purpose, growth and evolution of the organization.

What it Looks Like

One or more workshops to accomplish Visioning, define PGE Imperatives and key Strategic Goals, alignment of Risk Appetite and KRIs, and the development of a Performance Blueprint with KPIs and Targets for the planning cycle.

Coaching

- Understand the team you have.
- Build the team you need.
- Empower trust and authenticity at every level.

At the very core of performance is relationships, and it starts with leadership. Creating clarity and balance at both individual and team levels builds authentic rapport, trust and the kind of shorthand that high-performing teams are known for. The key to achieving and maintaining that success is to recognize that your team needs to evolve as the organization grows. And, the very nature of complex adaptive systems means that every change in leadership changes the rules and dynamics of the entire team.

What it Looks Like

I start every project with team alignment, using cutting edge personality science, and a quantum-intelligent philosophy to help your team improve cohesion and trust. That work continues as needed to address significant strategy shifts or changes in team structure.

Strategic Planning: Essential Strategy QI Foundation

Essential Strategy is a simplified approach for designing and executing strategy that improves organizational performance and long-term sustainability. It is built on a purpose, growth, and evolution foundation that brings clarity and focus by using the nexus where these three things converge to reveal hidden opportunities and weaknesses in strategy, and by creating a mechanism for a more intentional prioritization of time, energy, and resources.

True growth and resilience require a fundamental shift in strategic planning and design to recognize the complex adaptive nature of the organization. It must balance the needs of the people within and the external needs of clients, partners, industry, and stakeholders. This is where *quantum-intelligent strategy design* brings value.

The Essential Strategy approach works so well because it creates intense focus on those things that matter most for the health and sustainability of the organization. Aligned with the core principles of quantum physics and complexity science, **this quantum-intelligent approach overcomes traditional failings of the strategic planning process because it emphasizes strategic thinking discipline over static plan building.**

Four Rules of QI Strategy

- **Purpose** must be internally compelling and contribute to a cause greater than the entity itself.
- Growth is not **Growth** unless it can (also) be measured by the benefit provided to the stakeholders both in and outside the organization.
- **Evolution** requires active anticipation of the changing needs and wants of both those who support and those who are served.
- Purpose, Growth & Evolution are inherently connected and must exist in a state of **Equilibrium** for the health and sustainability of the organization.

Defining Risk Appetite

Risk Appetite is a strategy discussion. Grounded in QI philosophy and tied to the core PGE pillars of Essential Strategy, we answer four critical questions as part of the planning process to create clarity and guidance for strategy implementation and to establish expectations for risk-taking.

1. How much do we invest before the cost is too great?
2. How fast can we get there without sacrificing value?
3. To what extent are we willing to change?
4. What threats have the potential to disrupt the Mission Critical Path?

What It Looks Like

1. We start by defining or confirming a compelling and contributive Purpose (vision + mission + values) that serves as the heart of the plan and explains the why, what, and how customers are served.
2. Next, we identify key imperatives for delivering Purpose (the mission), fostering Growth (for sustainability), and allowing Evolution (to maintain relevance) together with key measures of success.
3. We then focus on the overlapping commonalities between PGE imperatives, using that as the mechanism for prioritizing time, energy, and resource in deploying strategy, and to ensure we've addressed any remaining gaps or weaknesses in the plan.
4. The final piece is the development of the Performance Blueprint with targeted goals, timelines, and KPIs.

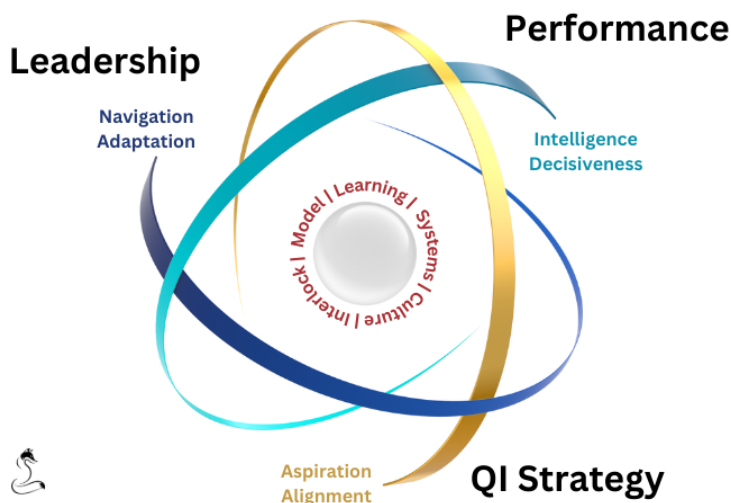
Performance Intelligence: ESQI 360 Model

Information is power. The QI 360 Model, anchored by the purpose/growth/evolution foundation of Essential Strategy, was designed to support the identification of key performance drivers from the inside out. It leverages deep expertise in enterprise risk, resilience planning, and strategy design to give you a holistic view of what is - and is not - driving positive strategic performance for the stage of growth you're in right now.

Operational Core

Analysis starts with the Business Core, working to reveal the inner functioning of the organization itself, as well as the how well the organization understands its market, industry and socio-political environment.

- **Business Model & Systems** focus on the mission critical infrastructure.
- **Culture & Learning** assess the health and thriveability of the human asset and its capacity for organic problem-solving.
- **Interlocks** show us where the dots connect, where we have gaps, and where hidden opportunities lie.



Business Discipline

Assessing Business Discipline works to identify the level of agility or rigidity.

- **QI Strategy** focuses on the structural design of key strategy elements.
- **Performance** measures how well the Model & Systems support results, and how well results align with intended outcomes.
- **Leadership** assesses how clearly and to what extent vision and strategy are articulated and support Culture & Learning.

Quantum Intelligence

The final level of assessment measures for cohesion of purpose across the organization, focused on key elements necessary for sustainability.

- **Aspiration & Alignment** (Purpose)
- **Intelligence & Decisiveness** (Growth)
- **Navigation & Adaptation** (Evolution)

Attributes of the QI Organization

Six key attributes support the Purpose, Growth, Evolution foundation, and exemplify the organization's ability in maintaining equilibrium and agility in the face of continual evolution.

- **Aspiration** is how we define our cause – the reason that the entity exists - a reason so compelling it speaks to clients, customers, partners, stakeholders, employees, and bystanders alike.
- **Alignment** tests how well our people, assets and resources are deployed to support progress towards that reason.
- **Intelligence** is the depth and breadth of data and analysis relevant to capabilities, resource allocation, and market drivers.
- **Decisiveness** is tied to the timeliness and effectiveness of strategic decisions made based on that analysis.
- **Navigation** recognizes that no matter how well we plan, there is no predicting the future. Once the plan is launched, how well we monitor its performance is critical to success.
- **Adaptation** is the ability to anticipate, communicate and effectively manage change consistent and in alignment with vision.

Executive Coaching: Quantum Intelligent Leadership



I am a Strategy Coach – my focus is to improve strategic performance of senior executives so they can successfully lead the organization.

Just like you need deep awareness of how your organization functions, you also need deep awareness of how your team functions from cognitive, interpersonal, and motivational perspectives. This is especially critical when members of your senior team come and go because those shifts change the dynamics of how the team functions. I help build powerful, trusting and cohesive teams by leveraging both quantum-intelligent philosophy and cutting-edge science like **PrinciplesUs**.

Coaching Cornerstones of Quantum Leadership

Purpose Growth & Evolution

Just as you articulate clear priorities for the purpose, growth, and evolution of your organization, you need to do the same for yourself. Bringing awareness and intentionality into this equation creates clarity and focus that will support your future journey, wherever it may take you.

Empowered Authentic Leadership

Empowered and trusting teams show higher levels of creativity, collaboration, and commitment to a shared vision. They foster adaptive thinking, measure benefit in holistic terms, and embrace uncertainty. This is what drives success.

Quantum Intelligent Mindset

Understanding your organization requires an approach that appreciates the entire system while not losing sight of each individual element that contributes to it. Holism in executive coaching means that while we address specific challenges, we always keep an eye on how changes impact the larger organizational ecosystem.

PrinciplesUs - Personality Archetype Assessment

When individuals understand the greater context of how to engage and connect with others on their team, it provides powerful insight that supports creative problem-solving in strategy execution. To open the door to this kind of awareness, I use the **PrinciplesUs** coaching platform, designed to help people learn what they are really like so they can build better relationships. Learn more on the next page.

ECHO Listening Intelligence Profile

Listening is a brain-based function, and no two brains are alike. Every individual has unconscious preferences for listening that involve taking in specific types of information. If we can understand the type of information we habitually listen to and for, we can better understand our cognitive biases relative to others. The ECHO is another tool I use when improving communication is critical to moving forward.

PGE Inventory

The PGE Inventory is a free assessment I've developed to help leaders take the PGE model and apply it to their own personal trajectory. It is a self-reflection tool that allows you to explore what is deeply meaningful to you at this stage of your life, and then contemplate how those priorities are brought forward and prioritized in your life and career.

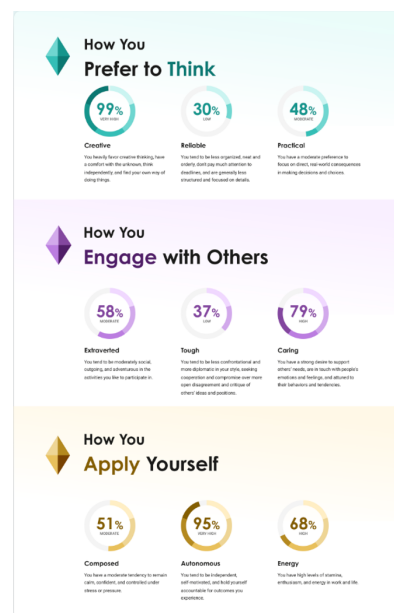
What it Looks Like

- Every project launches with the PrinciplesUs individual assessments together with other discovery work.
- Workshops kick off with a discovery of PrinciplesUs team profiles to build team cohesion for the work to come.
- Coaching flows through every stage of the project, individually and as a team, to support strategy alignment.
- Post-project coaching may be high-level at quarterly check-ins (included for year one) or expand into more targeted work based on issues revealed during the project, or as new leaders come in.

Executive Coaching: Discovering Personality Archetypes with PrinciplesUs

When individuals understand the greater context of how to engage and connect with others on their team, it provides powerful insight that leads to creative problem-solving and strategy execution. To open the door to this kind of awareness, I use the **PrinciplesUs** assessment and coaching platform, designed to help people learn what they are really like so they can build better relationships.

Its creators include **Ray Dalio**, entrepreneur and investor behind Bridgewater Associates, together with expert psychologists **Dr. Adam Grant**, **Dr. Brian Little**, and **Dr. John Golden**. **PrinciplesUs** combines best-in-class frameworks, leading personality science, and practical, proven insights from decades of real-world business experience.



Strategy requires powerful, trusting, and aligned teams.

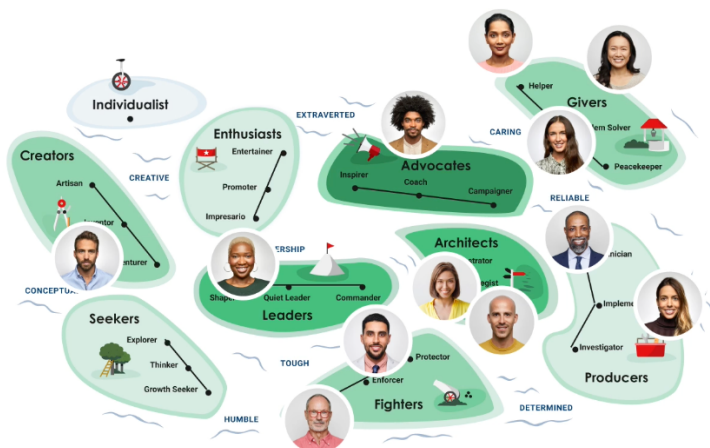
One simply does not exist without the other.

PrinciplesUs is my preferred assessment for raising individual awareness around Personality Traits

- It focuses on creating greater awareness of cognitive, interpersonal, and motivational traits, allowing it to serve both the individual and the team.
- It celebrates individuality by recognizing primary and secondary archetypes (because people are complex), and also illustrates that while we have core personality traits, we often work outside of those (in free traits) to accomplish important work in both our personal and professional lives.
- The assessment has tremendous depth, but the presentation is easy to follow, understand, and utilize. It is scientifically validated as a reliable measure of personality and is more accurate than anything else I've seen.



See How People Complement Each Other and Where There Are Gaps



Using the **PrinciplesUs** team dashboard, we access reports that provide a vivid portrait of how the team can leverage its collective strengths, and where greater awareness can foster adaptive learning, personal growth and team synergy.

Understand Yourself

Understand Others

Help Others Understand You

Project Delivery

Strategic planning typically falls short in pre-planning analysis and post-design implementation. My process is robust in addressing these two areas in particular to ensure you realize tangible, measurable results while gaining internal efficiencies. The depth and focus for each stage vary based on the unique needs of the organization. I don't believe that one size fits all, so the final strategic plans and performance blueprints designed will be as unique as you are.

Your organization is unique.

Your project will embrace and leverage that uniqueness for all the opportunities it brings.

Discovery focuses on an analysis of the internal capabilities and perspective of leadership regarding strategy and risk, as well as an external review of drivers and constraints affecting the organization and strategic performance. Depending on the project, it may include interviews, surveys, and workshops.

Alignment occurs at every phase, continually tying data to goals, and goals to purpose. Vision, mission and values create the foundation of strategy, and so just like building a house, we will focus here early on to set the stage for the balance of work to come.

Pathfinding is the problem-solving stage where outputs of Discovery and Alignment combine to support strategic decision-making. Here we define strategic imperatives and key supporting goals that deliver on purpose, drive growth, and build resilience through ongoing learning and evolution.

Performance is where the plan to execute strategy comes full circle to create the Blueprint for guiding implementation of strategy. Realistic and feasible goals, tactics, metrics, and targets are defined to accomplish the work and achieve intended results. Performance also includes post-workshop strategy coaching to continue building team cohesion and leadership synergy.

Facilitation that Works

Facilitation is about creating a space that makes it easy for a group of people to come together and work together to find real solutions to critical problems.

I don't do off-the-shelf anything. Your workshops will include a combination of thought provoking, perception expanding and engaging experiences designed to fit the people you have and the solutions you need.

- Create "space" away from the day-to-day operations to think strategically.
- Get your team to step out of their status quo mindset.
- Provide an opportunity for people to connect and gain a deeper understanding of each other's talents.
- Encourage open communication by leveling the playing field in terms of position and status.
- Expand knowledge and strategic thought discipline through a quantum-intelligent lens.
- Incorporate activities that are active and engaging to keep the energy high and the work productive.

Proposals

When you're ready to move forward, I will provide a proposal to finalize the scope of work. If we mutually agree that the project is a good fit, then working through budget and timelines is all that remains.

I understand firsthand the time and expense involved to tackle strategic planning. We will work together to ensure that you get the ROI you need.

My pricing structure is milestone based, with all time and expense included - even travel.

Proposals Include:

- Project Scope
- Timeline
- Assumptions & Commitments
- Outputs and Deliverables
- Investment Breakdown by Milestone

What's Next?

Everything begins with a conversation!



[Schedule your Discovery Call](#)

From My Clients

Sana Effird, State of Alaska Commission on Postsecondary Education

Erin's approach is not the usual formula-driven process. I would recommend her to any organization that wants to embrace a new direction that goes beyond the bottom line and also includes engaging all the human aspects needed to successfully implement.

Lydia Griffey, Senior Principal Stantec

We thought we knew what the problem was, but Erin's analysis revealed that we actually had a completely different issue. She worked with our team and the results have been extremely successful – we couldn't be happier. Erin's ability to get at the root of a problem and then support a team in crafting the solution is exceptional.

Nina B., Executive Attorney

Erin's combination of warm approachability and laser focus make her an outstanding coach. She has an intuitive sense to ask just the right question at just the right moment, and her quick intelligence and ability to read (and listen) between the lines are what truly set her apart. Working with Erin has propelled me forward both professionally and personally, and I recommend her without reservation.

Steve Ginnis, Executive Director Fairbanks Native Association

I have had the opportunity to partner with Erin on multiple projects. The outcomes from our planning sessions have always been clear and relevant towards our mission; I appreciate her experience and dedication.



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Black Fox Strategy is a Woman-Owned Small Business