



## Workshop Description

Most successful organizations recognize how important strategic planning is for ensuring all resources are aligned towards a specific objective. Yet many clients we work with suffer from 'SPOTS' phenomenon – Strategic Plan On The Shelf! There are many reasons why plans fail or are 'shelved' and much of it has to do with a lack of key stakeholder involvement, the process for planning is cumbersome, and a lack of buy-in for cascading, maintaining, and sustaining the plan.

Our Strategic Planning Workshop delves into a proven, seven-step planning process and hones the facilitation skills required to collaboratively create and successfully implement strategies that will have the power to shape the future of your organization.

You'll learn how to prep, design and facilitate a proven strategic planning process that Facilitation First professional facilitators have used with many of their clients. We'll investigate how to build buy-in, avoid client sabotage and lack of accountability, and walk-through step-by-step from designing and leading strategic planning to ultimately operationalizing the plan.

## The Learning Opportunity

Participants will be able to:

- Articulate why strategic planning is important
- Show up: Embrace the 5 facilitator core practices
- How to stay neutral and facilitative questioning
- Understand the 7 Step Strategic Planning Process
- Learn critical factors for effectively prepping for your sessions
- Define your client's expectations and responsibilities up front to ensure better buy-in and accountability
- Get clear on non-negotiables and the team's level of decision-making authority
- Determine the right strategic planning team
- Utilize step-by-step process notes for virtual or in-person facilitation of strategic planning
- Successfully open the event
- Use tools for facilitating an analysis of the current, future states and respective gaps
- Convert gaps into strategic goals, metrics and strategies
- Operationalize your key strategic goals into ultimately a tangible annual plan
- Choose concrete ideas for cascading, monitoring and sustaining the plan going forward

## Workshop Modules

### Day 1

#### Module 1: Get Ready to Plan

- How to Show Up: Facilitator Core Practices
- Getting Ready – Preparing
- Define the Leader's Expectations & Responsibilities
- Define Non-Negotiables & Empowerment
- Define the Strategic Planning Team
- Define and Create the Right Pre-Reads
- Prepare for the Future
  - Use the DEPEST Tool
  - Creating a BHAG Statement

#### Module 2: Starting the Strategic Planning Session

- How to Set Context
- Determining Setting Context Elements for My Client & Exercise
- Step 1: Define the Future State
- Exercise: Define Your Future State (*Group Facilitation #1*)
- Step 2: Define the Current State
- Exercise: Define the SWOT (*Group Facilitation #2*)
- Step 3: Define the Gaps

### Day 2

#### Module 3: Developing Our Goals, Metrics and Key Strategies

- Exercise: Synthesize and Prioritize the Gaps (*Group Facilitation #3*)
- Step 4: Define the Goals, Metrics and Key
- Exercise: Use the Tension Chart Process (*Group Facilitation #4*)

#### Module 3: Developing Our Goals, Metrics and Key Strategies, Cont'd

- Goals – Key Performance Indicators (KPI's) – Strategies Presentation & Feedback Exercise
- Facilitator Prep and Pre-Work
- Importance of Defining Goal Champions

#### Module 4: Getting to Our Annual Plan

- Step 5: Exercise: Create the 3 –Year Rolling Plan (*Group Facilitation #5*)
- Step 6: Exercise: Define the Annual Plan (*Group Facilitation #6*)
- Step 7: Cascade, Monitor and Sustain the Plan

#### About Facilitation First

For over 25 years our mission has been to share our passion for the design and facilitation of highly collaborative meetings based on consensus driven, focused results. Facilitation First has grown to include many certified trainers and professional meeting facilitators across Canada.

