

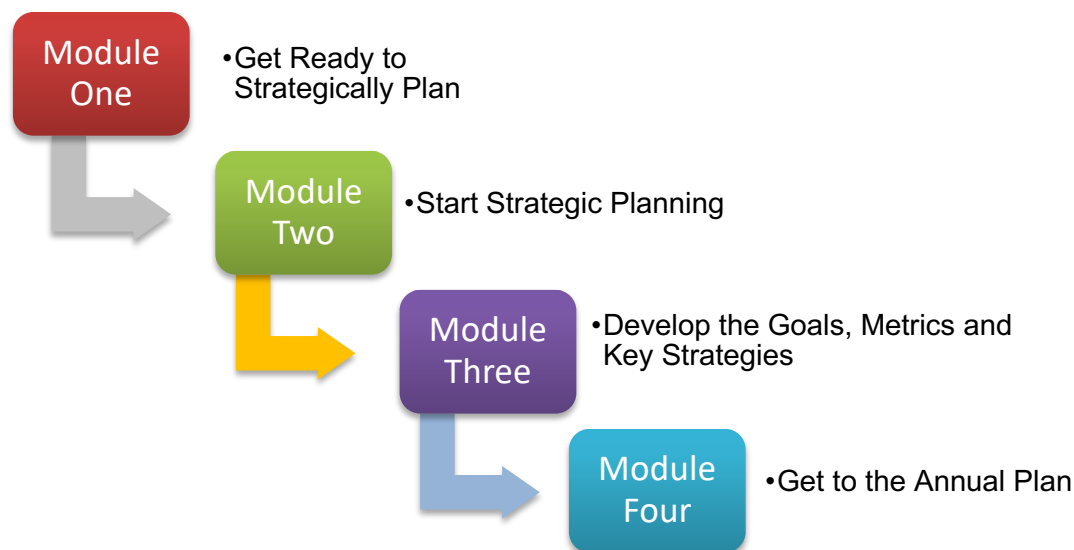
# Facilitating Virtual Strategic Planning

Delivered Via Virtual Classroom Over Four Half Days or Two Days

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Our Virtual Strategic Planning Workshop delves into a proven, seven step strategic 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.

The overall focus of this workshop is to learn how to facilitate the development of a strategic plan and a process for operationalizing the plan for implementation. The essence of our proposed strategic planning process can be described in the four phases below:



## The Learning Opportunity

The format of this workshop incorporates a highly interactive lecture style and an applied learning environment that includes group work, a case study, as well as using a variety of strategic planning tools and techniques.

At the end of this workshop, you will be better able to:

- Articulate why strategic planning is important
- Show up: The five facilitator core practices
- Identify critical factors to consider for effectively prepping for your sessions
- Define your client's expectations and responsibilities up front to ensure better buy-in and accountability
- 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 from a set of concrete ideas for cascading, monitoring and sustaining the plan going forward

# Facilitating Virtual Strategic Planning Workshop Agenda

## Day #1 Half Day - 3.5 Hours

- Setting the Context
- Why Strategic Planning is Important

### 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: Creating the DEPEST
  - Prepare for the Future: Creating the BHAG/Ambition Statement
  - Day #2 Facilitator Prep

## Day #2 Half Day – 3.5 hours

### 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 #3 Facilitator Prep

## Day #3 Half Day – 3.5 Hours

- Setting the Context & Improvement Feedback

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

- **Step 3:** Define the Gaps, cont'd
  - Exercise: Synthesize and Prioritize the Gaps (Group Facilitation #3)
- **Step 4:** Define the Goals, Metrics and Key Strategies Exercise (Group Facilitation #4)
  - Goal – Key Performance Indicators (KPI's) – Strategies Presentation & Feedback Exercise
- Day #4 Facilitator Prep and Pre-Work

## Day #4 Half Day – 3.5 hours

- Setting the Context
- Importance of Defining Goal Champions

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

- **Step 5:** Exercise: Create the 3 –Year Rolling Plan Exercise (Group Facilitation #5)
- **Step 6:** Exercise: Define the Annual Plan Exercise (Group Facilitation #6)
- **Step 7:** Exercise: Cascade, Monitor and Sustain the Plan
- Creating Day #4 Closure



## Why Facilitation First

For almost 25 years, Facilitation First has been top of mind for those seeking training in process facilitation. Our Facilitating Meetings with Ease workshop has been honed by Ingrid Bens, author of the national bestselling books 'Facilitating with Ease' and 'Facilitation at a Glance!'. With thousands of participants rating the course an average 4.5 out of 5, we provide an experiential workshop that equips learners with simple yet powerful tools that they can apply in their next meeting.