

Facilitating Strategic Planning & Implementation

Workshop Overview



Introduction

This Strategic Planning Workshop delivers an intensive program focused on honing the skills you require to create and successfully implement strategies that will have the power to shape the future of your organization.

The overall focus of this two-day workshop is to develop a strategic plan that can then be positioned for effective implementation. The essence of effective strategic planning can be described in the four phases below.

Phase One: Understanding The Strategic Planning Process

- Ensure you are using the appropriate strategic planning process for your organization

Phase Two: Current State Assessment

- Use an evidence-based approach to assess your current environment

Phase Three: Defining Your Future State

- Articulate your desired future state through your Mission, Values and Vision

Phase Four: Strategy Development and Execution

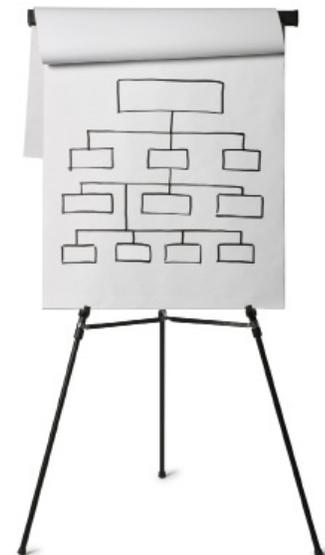
- Develop and execute a strategic plan to successfully realize your future state

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



Strategic Planning & Implementation

Agenda & Outcomes



Phase One: Understanding The Strategic Planning Process

This phase focuses on providing you with a general foundation to develop the strategic plan. The session introduces the various elements of the process and will build your skills to customize the process for your firm's specific needs. Although the general approach to strategic planning is consistent regardless of your organization's size, industry or maturity, execution of the strategic planning process can vary significantly. The goal of this phase is to provide you with insight into how to develop the most effective strategic planning process for your firm.

Phase One Key Learnings

- Defining the role of the Leadership Team, Board and Senior Managers in your strategic planning process
- Identifying why, when and how to engage stakeholders throughout the strategic planning process
- Ensuring your strategic planning process is powerful enough to guide the future of your organization
- Developing a process that does not end with the publishing of your strategic plan, but instead continues throughout the life of the strategy

Phase Two: Current State Assessment

The goal of any strategic planning exercise is to identify the strategic direction in which your firm will be travelling over the next stage of its development. This strategic direction must be developed through an evidence-based approach by analyzing your current environment. Through the introduction of various stakeholder engagement methods and research methodologies, participants will learn how to assess their organization's internal and external environment.

This module will also teach participants to take the data collected from this environmental scan and articulate the key findings into a S.W.O.T. analysis (Strengths, Weaknesses, Opportunities, Threats). A case study or case examples will be utilized to further help participants develop a S.W.O.T. analysis in order to highlight the key issues and inform the development of strategic options in an organization's Strategic Planning Process.

Phase Two Key Learnings

- How to identify the internal strengths and weaknesses of your organization relative to customers' expectations and competitors actions
- Evaluating the external environment to understand issues that pose a potential threat to your firm and those that present an opportunity to enhance the success of your organization
- How to use all the data to prioritize your key strategic issues



Strategic Planning & Implementation

Agenda & Outcomes, Continued

Phase Three: Defining Your Future State

Strategy is about making choices – often between many compelling options. Organizations end up focusing on too many priorities rather than selecting a few critically important things to execute exceptionally well. The key is focus – to clearly articulate the unique value you want to deliver to your clients and then to identify how best to build an organizational operating model that will deliver this value.

This phase will describe how to create and validate the Vision, Mission, Values, Value Proposition and Long-Term Scorecard that form the strategic foundation of your organization.

Phase Three Key Learning

- Developing a strategic mind set designed to challenge your firm's strategic position in the marketplace

Phase Four: Strategy Development and Execution

At this point participants have an understanding of how to assess their organization's current state and articulate their organization's future state. This phase will aim to teach participants how to develop prioritized strategic initiatives and tactics to realize the future state of their organization.

Developing the right strategy is difficult but successfully implementing that strategy is even more difficult. The single biggest challenge to successfully implementing any strategy lies in aligning your people and the organization so that every employee understands where you are trying to get to, how you will get there and who needs to do what to make it happen. This phase will also introduce key considerations in moving the plan forward through implementation so that the expected results are achieved.

Phase Four Key Learnings

- Practice developing strategic initiatives and supporting tactics
- Understanding the role leaders play in driving strategic change
- Creating alignment throughout the organization
- Developing a management process that checkpoints progress against the annual business plan

