



# An Executive Briefing on Strategic Planning

Selling the Plan Inside

**Leadership**  **Strategies**  
The Facilitation Company

[www.leadstrat.com](http://www.leadstrat.com) | 800.824.2850

Complete the brief survey at the end of the session to receive:

- A free white paper on Leadership Strategies' proven planning methodology, the Drivers Model

*Answers to the fill-in-the-blanks are located at the end of this workbook.*



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56 Perimeter Center East, #103  
Atlanta, Georgia 30346  
800.824.2850  
[www.leadstrat.com](http://www.leadstrat.com)

# A. Getting Started

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- A1. Who is Leadership Strategies?
- A2. Session Objectives
- A3. Survey
- A4. Session Agenda
- A5. Handling Questions
- A6. Our Session Facilitator

## A1. Who is Leadership Strategies

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- The leading provider of professional meeting facilitators and facilitation training in the U.S.
- More Certified Master Facilitators than any other organization
- Specializing in training, strategic planning, process improvement, and other services
- Over 500 facilitators through the FindaFacilitator database
- Public classes in major cities in the U.S., Canada and Australia
- Over 18,000 trained in facilitation skills through The Effective Facilitator and other courses
- Headquartered in Atlanta, GA

## A2. Session Objectives

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- Provide an overview of strategic planning, the process, and components
- Address why most plans fail
- Identify key pitfalls to avoid
- Recommend strategies for selling the plan inside
- Provide guidance on choosing the right facilitator
- Provide next steps for those who would like to learn more

## A3. Survey

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Complete the short survey at the end of the session to receive:

- A **free white paper** on Leadership Strategies' proven planning methodology, the Drivers Model
- A handout copy of this session's slides

## A4. Session Agenda

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- A. Getting Started
- B. What is Strategic Planning?
- C. The Strategic Planning Process
- D. The Management Briefing: Selling the Plan Inside
- E. Choosing the Right Facilitator
- F. Next Steps

## A5. Handling Questions

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- Because of our limited time, we won't be able to answer all questions, but we will try to get to as many as we can.
- From time to time, we will ask you a question. You will have about a minute to respond, and we will show you the results.

If you have questions:

- Type them into the question panel
- Call 800.824.2850
- Contact us online at [www.leadstrat.com](http://www.leadstrat.com)
- Email [info@leadstrat.com](mailto:info@leadstrat.com)
- Connect on LinkedIn, Facebook, and Twitter

# B. What is Strategic Planning?

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- B1. What is Strategic Planning?
- B2. The Strategic Questions
- B3. The Drivers Model
- B4. A Sample Strategic Plan
- B5. A Sample Action Plan
- B6. Why Do Most Plans Fail?
- B7. Terms and Definitions

# B1. What is Strategic Planning?

Through strategic planning, executive management sets the overall \_\_\_\_\_ for the organization, identifies the key \_\_\_\_\_ to achieve the vision, and establishes the critical \_\_\_\_\_ to monitor progress.



Does your team do this?  
Yes | No



## B2. The Strategic Questions

Ask your team these questions:

- Where are we \_\_\_\_\_?
- Where do we \_\_\_\_\_ to be?
- What do we do to \_\_\_\_\_?
- How will we \_\_\_\_\_ our progress?

Does your team do this?

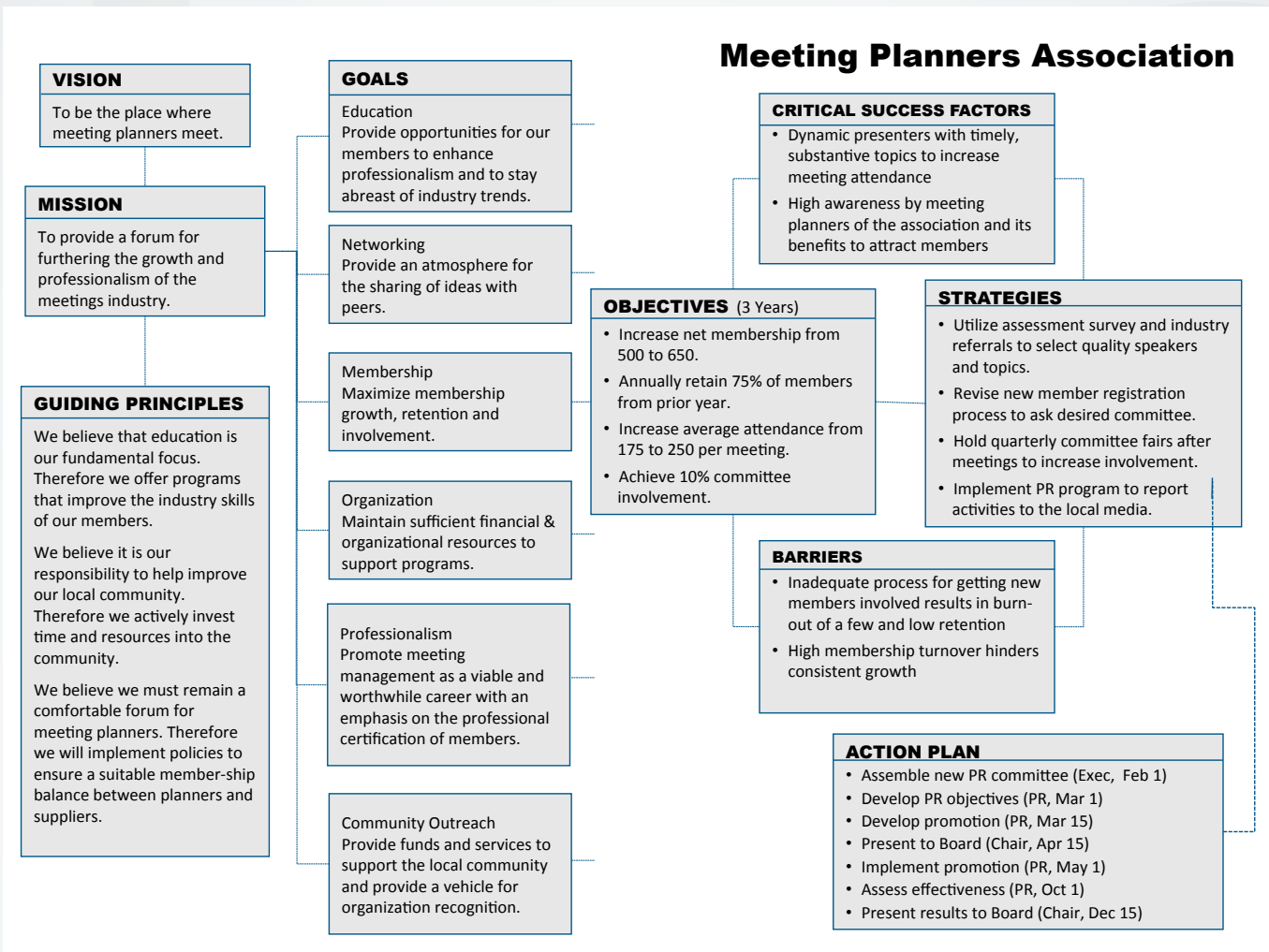
Yes | No

# B3. The Drivers Model™



Does your team do this?  
Yes | No

# B4. Sample Strategic Plan



# B5. Sample Action Plan

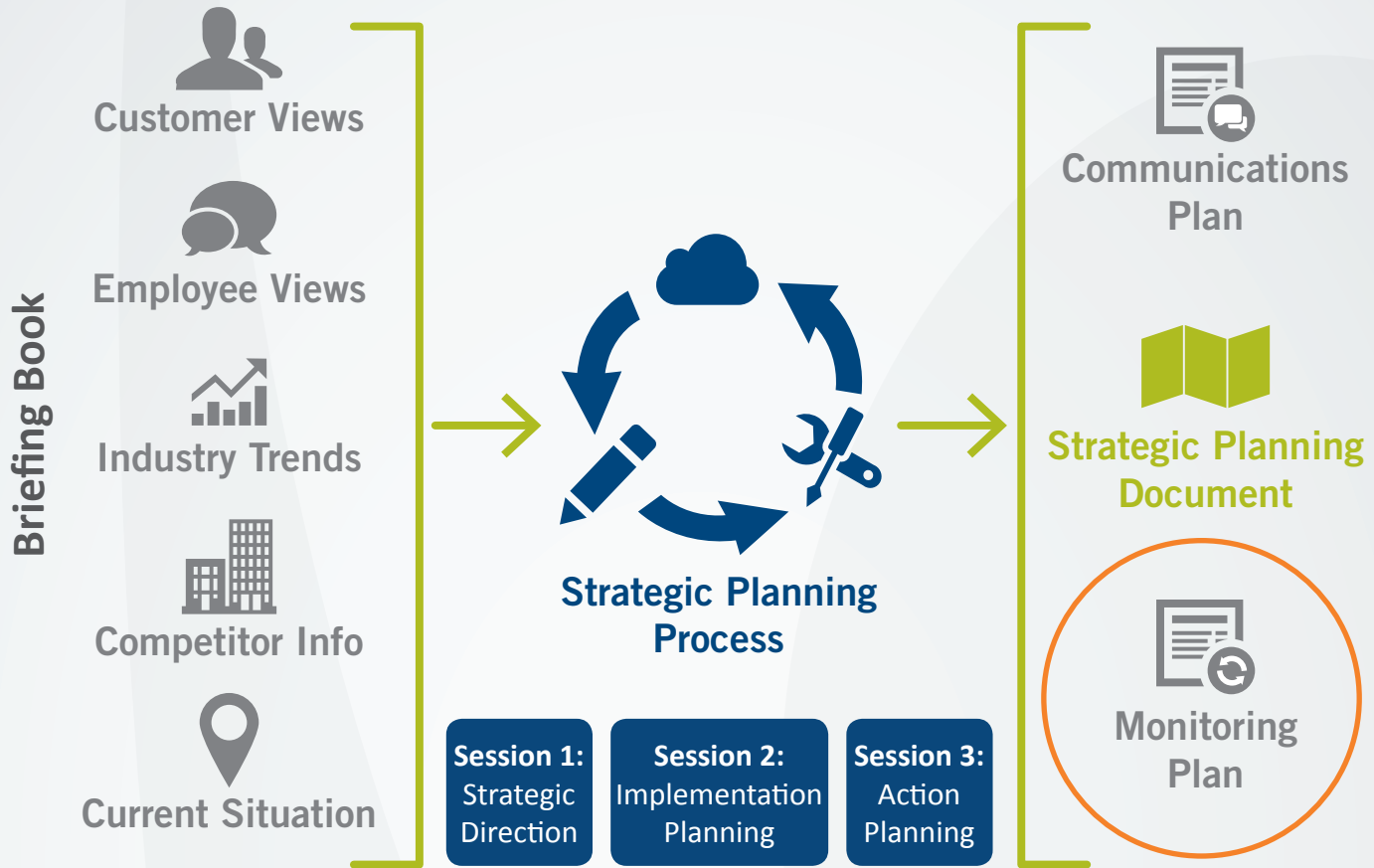
**Strategy:** C5. Implement PR program to report activities to the local media

**Objectives Supported:** Membership: 1. Increase net membership  
 Membership: 2. Increase average attendance at monthly meetings

**Owner:** Marketing VP      **Due:** Feb 1/ Year 2      **Cost:** \$2500      **Internal Time:** 27 person-days

Action Step		Who	Due	Person-Days	Costs
1	Assemble new PR Team	Exec Committee	Feb 1	1	
2	Develop PR objectives	PR Team	Feb 15	3	
3	Develop promotion program	PR Team	Mar 1	4	
4	Hold Board presentation on PR strategy to gain approval	PR Team, Board	Mar 15	1	
5	Implement PR strategy	PR Team	May 1	15	
6	Assess promotion effectiveness	PR Team	Jan 15/ Y2	2	\$2500
7	Produce PR report of results	PR Team	Feb 1/ Y2	2	

# B6. Why Do Most Plans Fail?



WEBINAR: AN EXECUTIVE BRIEFING ON STRATEGIC PLANNING

# B7: Terms and Definitions

_____	A picture of the “preferred future”; a statement that describes how the future will look if the organization achieves its ultimate aims.
_____	A statement of the overall purpose of an organization. Describes what you do, for whom you do it, and the benefit.
_____ _____	General guidelines which set the foundation for how an organization will operate.
_____	Broad, long-term aims that define accomplishment of the mission.
_____	Specific, quantifiable, realistic targets that measure the accomplishment of a goal over a specified period of time.
_____ _____ _____	Major items or issues that must “go right” to achieve one or more objectives.
_____	Existing or potential challenges that hinder the achievement of one or more objectives.
_____	Broad activities required to achieve an objective, control a critical success factor, or overcome a barrier.
_____ _____	Specific steps to be taken, by whom and by when, to implement a strategy.

Does your team know these terms and definitions?  
Yes | No

# C. The Strategic Planning Process

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- C1. The Sponsor Interview
- C2. The Strategy Phases
- C3. Phase I
- C4. Phase II
- C5. Phase III
- C6. The 10 Pitfalls to Avoid

# C1. The Sponsor Interview

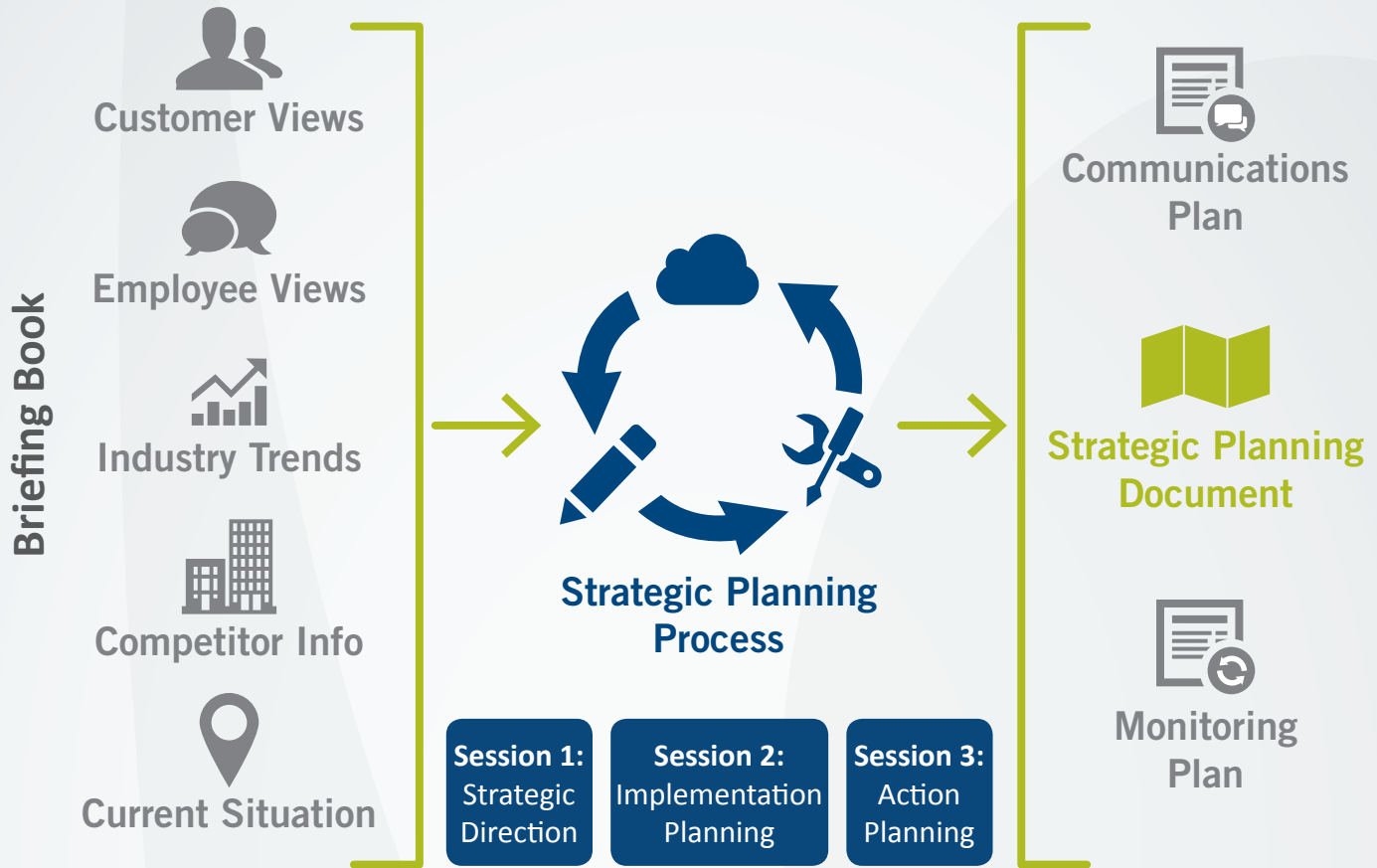
- The most critical preparation activity is to ensure you clearly understand the session \_\_\_\_\_. To do so, you should meet with the sponsor in advance.
- Establish \_\_\_\_\_.
- Review the sponsor’s role.
- Identify the 6 Ps of Preparation during the sponsor interview:

_____	Why are we having the meeting?
_____	What should be produced as a result of the meeting? The Three Hs: _____ _____ _____
_____	Who should attend the meeting?
_____	What are the topics that will need to be discussed?
_____	What steps should be taken in the meeting to achieve the purpose?
_____	What are the logistics?

Does your team do this?  
Yes | No



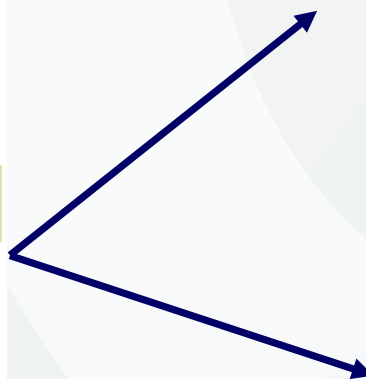
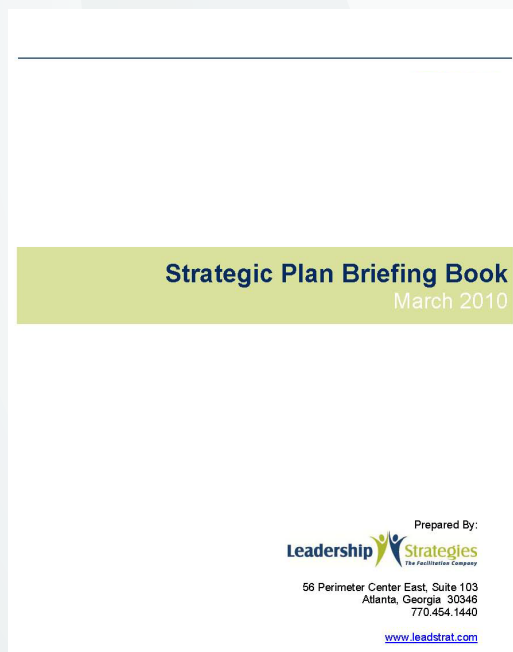
# C2. The Strategy Phases



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Does your team do this?  
Yes | No

	What do stakeholders think of the organization, our products, services and future possibilities? Vehicle: Interviews, Focus Groups
	What do our employees think of the organization, its products, services and future possibilities? Vehicle: Surveys, Suggestion Boxes, Focus Groups
	What are the directions of our industry in research, programs, public interest? How might we best benefit from these directions? Vehicle: Interviews, Speakers, Research
	What are our competitors and partners doing? How do we better position ourselves with respect to them? Vehicle: Interviews, Research
	What has been our performance against our past plan? What are our statistical trends? How successful have we been with recent initiatives? Vehicle: Data Collection



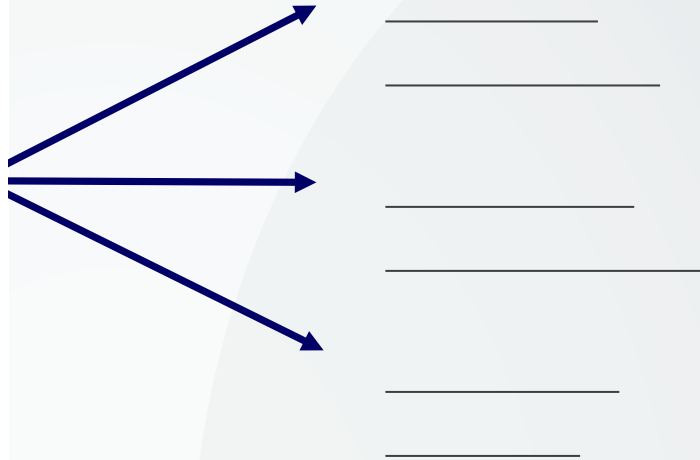
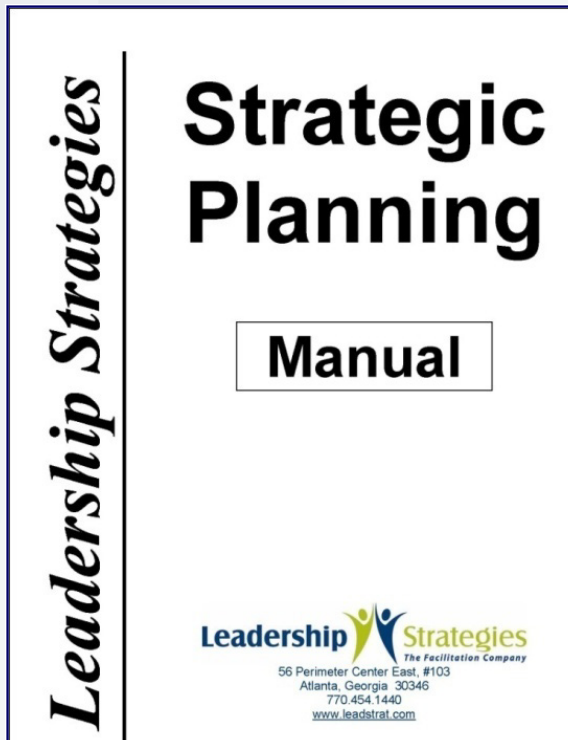
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Does your team do this?  
Yes | No



## C5. Phase III

How do you increase accountability for implementation?

1. \_\_\_\_\_ work
2. \_\_\_\_\_ responsibility
3. \_\_\_\_\_ and reporting process
4. \_\_\_\_\_ for achievement
5. \_\_\_\_\_ for inadequate performance

Does your team do this?

Yes | No

## Monitoring

Sample Dashboard Summary		80% B-	89% B+	95% A	84% B	95% A
		Jan	Feb	Mar	Apr	May
	Done 100	4	7	10	7	10
	>75% 75	5	3	0	1	0
	<75% 50	2	1	1	3	1
A1	Educate on screening recommendations					
B3	Develop a life course/life stage approach to disease prevention					
C1	Develop and implement marketing plan for Division					

## C6. The 10 Pitfalls to Avoid

- Not \_\_\_\_\_
- Not including key \_\_\_\_\_ in the planning effort
- Planning before undertaking a \_\_\_\_\_
- Developing a \_\_\_\_\_ first
- Confusing \_\_\_\_\_ and \_\_\_\_\_
- Measuring \_\_\_\_\_ instead of \_\_\_\_\_
- Jump start to \_\_\_\_\_ after developing \_\_\_\_\_
- Not developing detailed \_\_\_\_\_ for strategies
- Not gaining \_\_\_\_\_ before implementing the plan
- Not \_\_\_\_\_ the plan

Does your team avoid these pitfalls?  
Yes | No

# D. The Management Briefing: Selling the Plan Inside

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- D1. What is a Management Briefing?
- D2. Benefits of the Management Briefing
- D3. Steps Following the Management Briefing

# D1. What is a Management Briefing?

The \_\_\_\_\_ comes together for a 60-90 minute briefing to discuss:

- What are the most important \_\_\_\_\_ to be addressed by the plan?
- How does the \_\_\_\_\_ typically work?
- Are each of our issues addressed in the Drivers Model? What \_\_\_\_\_ would be needed?
- What \_\_\_\_\_ would need to be gathered in advance and by \_\_\_\_\_?
- How shall we move \_\_\_\_\_?

Does your team do this?

Yes | No

## D2. Benefits of the Management Briefing

- \_\_\_\_\_ of the issues to be addressed
- Modifications to planning approach to ensure their issues are fully addressed
- The information to gather to make the planning session highly productive
- Responsibilities for gathering the information and steps to prepare for the retreat
- Increased \_\_\_\_\_ and \_\_\_\_\_ to participate in planning and follow-through

Does your team do this?

Yes | No

## D3. Steps following the Management Briefing

- Develop/Distribute \_\_\_\_\_
- Hold Session I: \_\_\_\_\_
- Refine Objectives
- Hold Session II: \_\_\_\_\_
- Finalize the Plan
- Hold Session III: \_\_\_\_\_
- Approve Action Plan & Budget
- Execute \_\_\_\_\_
- Align Department Plans
- Align \_\_\_\_\_
- Begin \_\_\_\_\_
- Execute \_\_\_\_\_

Does your team do this?

Yes | No



# E1. Choosing the Right Facilitator

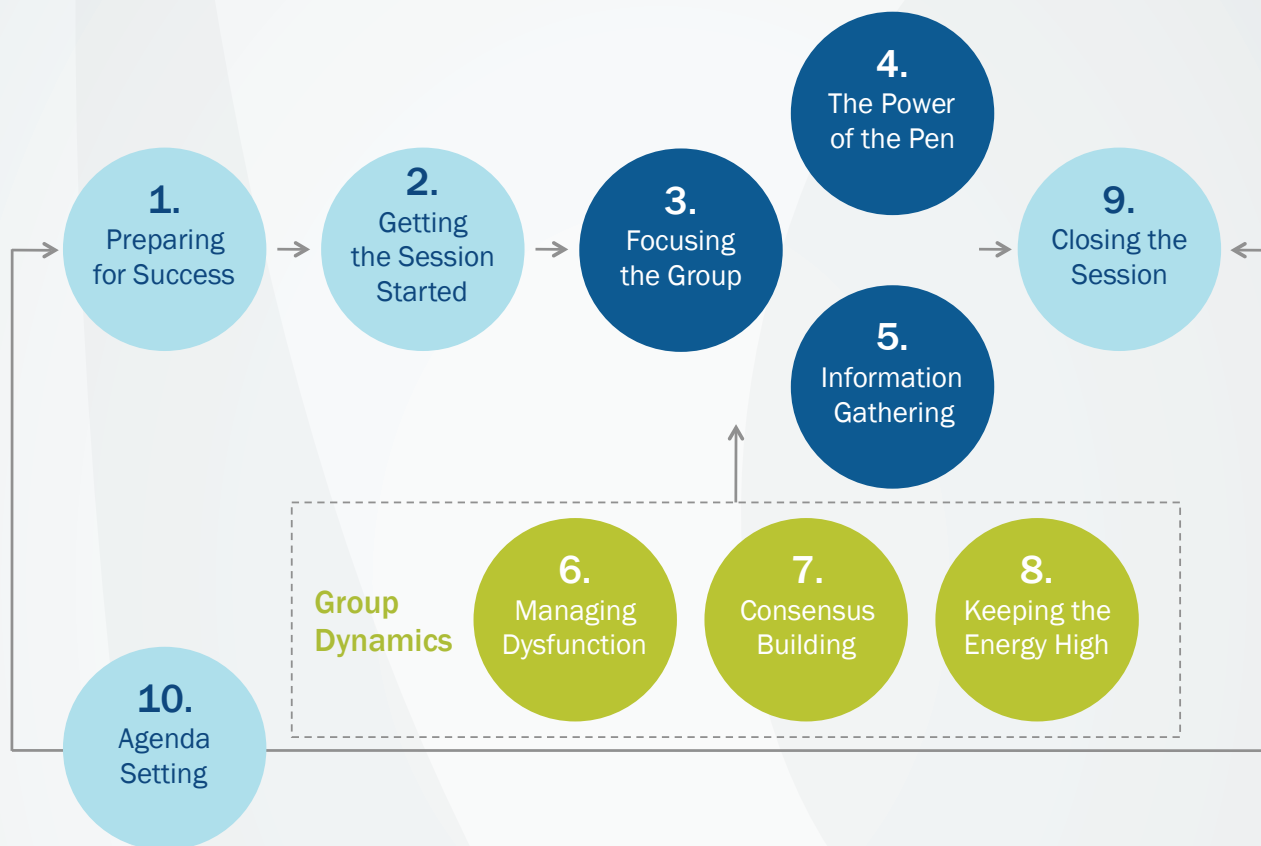
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- E1. What Does a Facilitator Do?
- E2. Choosing an Internal Facilitator vs. External Professional Facilitator
- E3. Questions for Choosing the Right Facilitator

# E1. What Does a Facilitator Do?

*The Facilitator's Methodology™*

## The Facilitation Cycle



Does your team do this?  
Yes | No

## E2. Choosing an Internal Facilitator vs. External Professional Facilitator

Internal	External
You know your business	They can be objective
CEO/CMO could _____	CEO/CMO can _____ _____ instead of trying to lead the planning effort
You are an _____ in your field	Professional Facilitator is _____ _____ planning efforts - specialized skill set
You have _____ exposure to strategic planning	Professional facilitators lead _____ strategic planning efforts each year

## E3. Questions for Choosing the Right Facilitator

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1. What questions do you have for me?
2. What strategic planning process do you use and how will you get my team's buy-in?
3. What is your process for preventing dysfunctional behavior?
4. When disagreements occur how will you get the group to consensus?
5. What is your approach for getting agreement from my team to undertake planning?
6. How will you make sure that this time we will actually follow-up and implement the plan?

### Get a **Management Briefing** for YOUR Team

- Let us help your team get on the same page right from the beginning.

### Arrange a **Facilitated Strategy Session**

- Get expert guidance from our facilitators so that your team is engaged, focused, and committed to addressing the real issues.

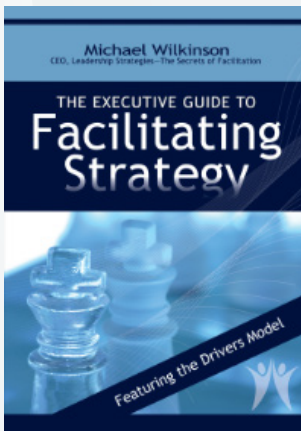
### Other Help

#### Training

- Secrets to Facilitating Strategy two-day course

#### Book

- *The Executive Guide to Facilitating Strategy*



# How did you do?

How is your team currently doing when it comes to strategic planning?

Check and record the number of times you checked “yes” and “no” in the workbook.

Yes!	No?

Talk with us about a **management briefing**.

Get your team on the same page and execute strategic planning the right way for *better results*.

# Answer to the Fill-in-the-Blanks

Page	Fill-in-the-blank Information
8	Vision, Strategies, Measures
9	Today, Want, Get There, Monitor
14	Vision, Mission, Guiding Principles, Goals, Objectives, Critical Success Factors, Barriers, Strategies, Action Plans
16	Purpose, Realistic Expectations Purpose, Product (Head, Hand, Heart), Participants, Probable Issues, Process, Place
18	Stakeholders, Employees, Industry Trends, Partners, Current Situation Key Observations, Potential Strategies
19	Definition Example, Success Strategies, Quality Check Defined, Accepted, Monitoring, Rewards, Consequences
20	Planning, People, Situation Assessment, Mission Statements, Goals, Objectives, Activity, Results, Strategies, Objectives, Action Plans, Buy-in, Monitoring
22	Planning Team, Issues, Drivers Model, Changes, Information, Whom, Forward
23	Common View, Buy-in, Commitment
24	Briefing Book, Strategic Direction, Implementation Planning, Action Planning, Communication Plan, Individual Performance Plan, Execution, Monitoring Plan
27	Lead, Expert, Minimal, Fully Participate, Trained to Lead, Many



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800.824.2850



**Leadership Strategies, Inc.** is the U.S. leader in meeting facilitation services, having trained over 19,000 individuals in facilitation skills over twenty years. We provide professional meeting facilitation services for areas such as strategic planning, issue resolution, team building, and other group sessions. We also offer expert training services that help individuals strengthen their soft skills through facilitation.

**TAKE A FACILITATIVE APPROACH**

## FACILITATION SERVICES

*Avoid wasting valuable time! Our professional facilitators provide the expertise and techniques for focused retreats and planning sessions.*

**Meeting Facilitation**

**Strategic Planning**

**Systems Analysis**

**Team Building**

**Issue Resolution**

**Process Improvement**

*We offer a free, one-hour briefing on "The Level-3 Organization." Call for more information.*

## FACILITATION TRAINING

*Give your key people the training they need! Our dynamic instructors will provide your people with detailed tools and techniques for success.*

- The Effective Facilitator
- Advanced Facilitation Skills
- Facilitator Certification Prep
- Facilitating Virtual Meetings: Comprehensive
- Leadership Through Facilitation
- The Seven Separators of Facilitation Excellence
- Secrets to Facilitating Strategy
- The Facilitative Consultant
- Facilitation Skills for Trainers
- Facilitating Virtual Meetings: Essentials
- Masterful Meetings
- Making Technical Meetings Work

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*Ask about classes we can teach at your site!*