

# Facilitating an Effective Strategic Planning Process

## Learning Objectives

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- Understand the Early and Necessary Discussions and Agreements Required to Successfully Facilitate Strategic Planning Sessions
- Leverage the Format of a Classic Strategic Planning Approach, to Learn a Set of Proven and Commonly Used Tools to Successfully Move the Strategic Planning Process to Tactical Action and Communication Plans
- Establish Processes to Move into the Execution Phase, Conduct Regular Review Sessions, Align the Organization, Communicate the Plan, and Get Organizational Buy-In

## Before–Early Discussions and Agreements

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- Understand Your Organization’s past Strategic Planning Experiences and Your Environment for Change, Including How Organizational Success Is Defined
- Develop a Consistent Understanding of Definitions and Terminology
- Establish Team Selection Criteria and Role Assignments
- Understand and Choose an Appropriate Strategic Planning Model, Frame of Reference, and Other Related Decisions
- Determine Performance Measures to Assess Milestones and Progress Towards Goals
- Ensure Up-Front Clarity and Agreement as to What Results Are Expected of the Process
- Agree on Logistics and Scheduling Needs and Considerations

## During–Strategic Planning Facilitation

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- Deepen Your Understanding of the Key Components of the Strategic Planning Process
- Learn a Set of Proven and Commonly Used Tools to Successfully Move the Strategic Planning Process to Tactical Action and Communication Plans
- Learn Practices and Tools to Enable Creativity and Innovative Thinking in Managers and Leaders
- Through Simulation, Demonstrate Your Understanding of These New Practices and Tools
- Learn How to Drive Organizational Results through an Effectively Facilitated Strategic Planning Session

## After–Strategic Planning Implementation

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- Establish the Next Steps in Moving toward the Execution Phase
- Conduct Regular Review Sessions to Check Progress Towards Milestones
- Establish Processes to Align the Organization, Communicate the Plan, and Get Organizational Buy-In