

1 TEAM ALIGNMENT WORKSHOP

(PROJECT KICKOFF - 4 HOURS)

OBJECTIVE

- Align Strategic Leadership Team (SLT) members around StratPro working as a team
- Establish charter for high caliber communications

AGENDA

- Introduce StratPro process and engagement objectives
- Review DISC behavioral and motivators profile of SLT
- Conduct Communications Commitment Exercise

OUTPUT

- Communications Commitment Charter
- Collective Behavior Agreement

2 VISION AND CULTURE WORKSHOP

(2-4 WEEKS LATER - 4 HOURS)

OBJECTIVE

- Establish the Vision that the organization expects to achieve from the StratPro process
- Determine the Values and Culture Statement

AGENDA

- Establish Organization Vision Statement
- Determine Organization Values
- Align Employee Experience & Customer Experience

OUTPUT

- Organization Vision Statement
- Organization Values & Culture

3 STRATEGIC ADVANTAGE WORKSHOP

(2-4 WEEKS LATER - 4 HOURS)

OBJECTIVE

- Align Organization Around Key Differentiators, Customers, and Products/Services
- Create Organization Positioning Statement

AGENDA

- Determine Key Customer Segments
- Review Value by Customer
- Determine Competitive Differentiators
- Develop Unique Value Proposition
- Create Organization Positioning Statement

OUTPUT

- Value by Customers
- Competitive Differentiators
- Unique Value Proposition
- Positioning Statement

4 ORGANIZATION DIAGNOSTIC WORKSHOP

(2-4 WEEKS LATER - 4 HOURS)

OBJECTIVE

- Review Business Diagnostic results to identify business strengths, weaknesses, gaps and priorities
- Generate organization Strengths, Weaknesses, Opportunities and Threats assessment
- Create Critical Success Factors

AGENDA

- Review Business Diagnostic Results
- Create SWOT Assessment
- Generate Critical Success Factors
- Identify Driving Critical Success Factors (DCSF)

OUTPUT

- Business Diagnostic Report
- SWOT Assessment
- Critical Success Factors & DCSF

5 PLAN DEVELOPMENT WORKSHOP

(2-4 WEEKS LATER - 4 HOURS)

OBJECTIVE

- Develop high-level Strategic Plan that includes Goals for achieving Critical Success Factors
- Generate Strategies and Action Plans

AGENDA

- Create Organization Goal(s)
- Create Strategies for Each Goal
- Create Action Plans for Strategies
- Prioritize Goals and Strategies

OUTPUT

- Organization Goals
- Strategies for each Goal
- Action Plans for each Strategy

6 KEY PERFORMANCE INDICATOR (KPI) WORKSHOP

(2-4 WEEKS LATER - 4 HOURS)

OBJECTIVE

- Develop lag and lead KPIs to track organization success
- Align KPIs with Goals and Action Plans

AGENDA

- Review Strategic Plan - Adjust as Necessary
- Review Financial Statements & Metrics
- Establish KPIs for Organization
- Set KPI targets for Goals & Action Plans

OUTPUT

- KPI targets assigned to Goals & Action Plans
- Scorecard

7 PLAN EXECUTION WORKSHOP

(2-4 WEEKS LATER - 4 HOURS)

OBJECTIVE

- Finalize the execution details of the Strategic Plan
- Includes ensuring responsible parties are assigned, dates and priorities are set, and tactics are developed for each Action Plan

AGENDA

- Review and Prioritize Goals & Strategies
- Review and Update Action Plans
- Agree on Timeframes for Action Plans
- Review Tactics for each Action Plan
- Allocate Resources to Tactics
- Update Organization Communications Plan

OUTPUT

- Strategic Plan (updated)
- Resources and Due Dates
- Tactics for Action Plans
- 90-day Sprints
- Communications Plan (updated)

8 PERFORMANCE ACCELERATOR WORKSHOP

(2-4 WEEKS LATER - 4 HOURS)

OBJECTIVE

- Prepare the team to transition from creating the organization's strategic blueprint to executing the blueprint

AGENDA

- Develop Accountability Chart
- Team PAVE Evaluation
- Improve Team Accountability Exercise
- Develop "To Don't List"

OUTPUT

- Accountability Chart
- Team PAVE Evaluation
- Accountability Agreement
- To Don't List

9 EXECUTION AND ACCOUNTABILITY (E&A) MEETINGS**(EVERY 2 WEEKS - 90 MINUTES)****OBJECTIVE**

- Bi-weekly meeting to focus on successful execution of the Strategic Plan

AGENDA

- Status Update by Each SLT Member
- Review Status of all Commitments
- Review Progress Against KPI Targets
- Review 90-day Sprints
- Discuss and Resolve Open Issues
- Identify Items to Communicate to Broader Team

OUTPUT

- Commitment Tracker Update
- Issue Tracker Update
- 90-day Sprint Update

10 ANNUAL PLANNING RETREAT**(ANNUAL - 1-2 DAYS)****OBJECTIVE**

- Review status of accomplishment of current Strategic Plan
- Review changes in business, priorities or competitive landscape that necessitate adjustments
- Adjust Strategic Plan as necessary

AGENDA

- Communications Alignment Exercise
- Discuss Annual Planning Assessment Questions
- Review Organization Vision
- Review Values, Culture and Brand Promise
- Discuss Strategic Advantage
- Review Accountability Chart
- Review Business Diagnostic and SWOT Assessment
- Assess Critical Success Factors
- Review Organization Financials
- Discuss/Review Organization Goals and Strategies
- Review KPIs Actuals vs Goals

OUTPUT

- Revisions to all elements of items listed in Agenda