Real-Time Strategic Planning Workshop

Six-Week Paced Course Overview

Six-week planning course designed for you to build your plan as you go.

90-minute, weekly webinar sessions led by OnStrategy Experts to provide direct feedback on your plan.

Weekly planning activities for you to complete with your planning team.

Access to guided training materials, including session agendas, presentations and worksheets for leading your team’s planning sessions.

Perfect for CEOs, Senior Management, and Strategy Leaders who want to follow along to create a strategic plan from scratch or revise a current one.

October 15 - November 19
$649 per course registrant

 October 15 - Session #1
 Thursday, 9:00 AM PST

 October 22 - Session #2
 Thursday, 9:00 AM PST

 October 29 - Session #3
 Thursday, 9:00 AM PST

 November 5 - Session #4
 Thursday, 9:00 AM PST

 November 12 - Session #5
 Thursday, 9:00 AM PST

 November 19 - Session #6
 Thursday, 9:00 AM PST

Have questions?
An OnStrategy Advisor is happy to help. Contact us to learn more about OnStrategy’s 2016 Strategic Planning Workshop at 1-775-747-7407 or email us at info@OnStrategyHQ.com
Session #1: Getting Started

Leader Lesson #1 (90 minutes)
Planning purpose and benefits
Planning framework and process overview
Identify your planning team
Identify what you want to accomplish through strategic planning
Identify your organization’s strategic issues
Review the Strategic Performance Index

Team Planning Activities (1-hour kickoff meeting)
Discuss the process and desired outcomes for your organization
Clarify what to expect
Identify strategic issues and enter them into OnStrategy

Team Homework: SWOT Worksheet and Questionnaire

Session #2: Determine Position

Leader Session #2 (90 minutes)
Organizational perspective
Customer perspective
Environmental, industry, and market perspectives
Create a SWOT
Customer segmentation

Team Planning Activities (2- to 3-hour planning session)
Complete the SWOT and enter it into OnStrategy
Create customer profiles and enter them into OnStrategy

Team Homework: Questionnaire on the Mission, Values, and Vision

Session #3: Develop Strategy

Leader Session #3 (90 minutes)
Mission, Values, and Vision
Competitive advantages
Organization-wide strategies

Team Planning Activities (3- to 4-hour planning session)
Complete intent for Mission, Vision, and Values
Consensus on the competitive advantages and organization strategy

Team Homework: Strategy Leader to finalize Mission, Vision, and Values
**Session #4-5: Building Your Plan**

**Leader Session on #4 (90 minutes)**
- Processing your SWOT
- Strategic objectives
- SMART goals
- Organizational goals

**Team Planning Activities (3- to 4-hour planning session)**
- Complete strategic objectives, SMART organization goals, and organization-level Key Performance Indicators

**Leader Session #5 (90 minutes)**
- Identifying Key Performance Indicators
- Cascading goals
- Budget

**Team Planning Activities (3- to 4-hour planning session)**
- Planning Team and Department Directors work to build out department action plans and noting items that require budgets

**Team Homework: Directors to develop goals for their departments**

**Session #6: Manage Performance**

**Leader Session #6 (90 minutes)**
- Review plan and strategies
- Communicate your plan and rollout
- How to manage your strategy and create accountability
- Use Reports and the Dashboard on a regular basis
- Using OnStrategy Mobile to manage your performance
- How to run a Quarterly Business Review (QBR), rollover your plan, and set a planning calendar

**Planning Team Meeting (3 hours)**
- Confirm the plan

**Plan Rollout to Organization**
- Buy-in for Strategic Plan

**Sign-up for January Training Webinar**
- Ability to use OnStrategy to track progress and update the plan
OnStrategy
Strategic Planning Workshop Facilitators

Zach Yeager
Client Engagement Manager
Workshop Host

Cory Podnar
Client Engagement Manager
Workshop Host

Erica Olsen
COO/Co-Founder
Guest Speaker

Howard Olsen
President/Co-Founder
Guest Speaker

Chelsea Voors
Client Engagement Manager
Guest Speaker

Nancy Olsen
VP Business Dev./Co-Founder
Guest Speaker

Jeff Brunings
VP, Client Development
Guest Speaker

Cammy Elquist LoRé
Client Engagement Director
Guest Speaker