

Strategy Huddle™ with MyStrategicPlan

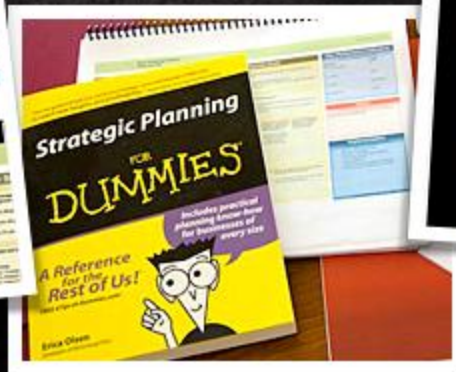
Welcome!

Powered by



- Purpose** Answer real-world questions, handle high-level strategy issues, and share best practices on strategy, execution, planning
- Duration** 45-60 minutes
- Your Role**
 - Ask questions: Questions can be submitted via the Chat Box on right at any time. **
 - Offer suggestions: Share your experience via the Chat Box during the topic at hand
- Details** Session is being recorded and a follow-up email this week will include a link to this huddle as well as the supporting slides.

- ⑥ In the past three years we have...
- ⑥ Managed 100+ strategic planning processes
- ⑥ Deployed 800+ strategic management systems (MyStrategicPlan, MyNonprofitPlan, MyChurchPlan)
- ⑥ Built consensus and commitment with 3,000+ executives, managers, boards
- ⑥ Empowered 1 million+ strategist & soon-to-be strategists



I. Strategy Stat of the Month

Facilitating your own Strategic Planning Retreat: An inside look at how to develop a great 2011 strategic plan (on the cheap). Learn the tips and tricks of preparing, facilitating, and following up from your upcoming offsite.

- II. Assessing if you are ready to begin your 2011 planning and what to do if you are not
- III. Identify who needs to be “at the table” and part of the process
- IV. Setting an effective agenda that results in the outcomes you are seeking
- V. Must-dos to move from flip charts to putting your plan into action
- VI. How to facilitate and participate at the same time
- VII. Tap into the Wisdom of the Crowd: Your Questions (Time Permitting)**

Managers spend
50% or more
of their time in meetings, but
research shows that
two-thirds of meetings end
before participants can make important
decisions.

Source: Marcia W. Blenko, Michael C. Mankins, and Paul Rogers, authors of *Decide & Deliver: 5 Steps to Breakthrough Performance in Your Organization*.

Assessing if you are ready to begin your 2011 planning and what to do if you are not

ASSESSING YOUR READINESS

Readiness Survey

Yes	No	Questions
		We have complete commitment and support from top leadership, especially the CEO, key management, and the board.
		We have a commitment to clarify roles and expectations for all participants in the planning process, including clarity as to who will contribute to the plan and who will be the decision makers.
		We are open to learning about and responding to the organization's internal and external to collecting information through outside research so we don't plan in a vacuum.
		We have a team comprised of big picture thinkers, subject matter experts, and a strategic plan manager.
		Top-level manager is willing to be inclusive and encourage broad participation, so that everyone feels ownership of the plan and energized by the process.
		We believe we have committed adequate organizational resources to complete the planning process as designed, for example, staff time, board time, dollars spent on the process and implementation.
		Everyone understands the purpose of planning because we realize what it is and is not. We have consensus about the desired outcomes of the planning process.
		We have a culture that is open to looking beyond the status quo to find new ways of doing things; a willingness to ask the hard questions, face difficult choices, and make decisions that are best for our clients.
		We want to grow our organization.

What to do if you are not ready

1. Consider an abbreviated process.
2. Build your planning “muscle” with one or two strategic initiatives.
3. Build internal support for why strategic planning is important.
4. Create success stories by showing results in single teams or departments.

Identify who needs to be “at the table” and part of the process

**WHO NEEDS TO BE INVOLVED
WHEN?**

Research ▶ Strategy ▶ Execution ▶

Impact

Organization, Community, Environment.

1 Discover your purpose and desired future	2 Assess your strategic position	3 Develop your strategies and priorities	4 Cascade your strategies to operations	5 Align your people & financial resources	6 Execute your plan
Mission: Determine your organizational purpose	Enviro Scan: Scan macro and micro trends	Competitive Advantages: Solidify your unique position	Forecast: Develop a 3-year financial projection	Capacity Planning: Assess people & org. structure	Implementation: Establish schedule
Values: Identify your corporate values	O and T: Identify market opportunities and threats	Org. Wide Strategies: Explain base for competing	Department Goals: Cascade org. goals to department (12 months)	Budget: Align a one-year budget with the plan	Leverage Tools: Train team to use MyStrategicPlan
Vision: Create an image of what success looks like	Customers: Target customers and value proposition	Long-Term Objectives: Define long-term strat. obj. (3+ yrs)	Team Member Goals: Cascade dept. goals to individual	Rollout: Communicate strategy to organization	Review & Adapt: Implement progress reviews including QSR
Agreement: Identify strategic issues to address	S and W: Determine strengths and weaknesses	Short-Term Goals: Set short-term SMART goals (1+ yrs)			Annual Update: Hold annual retreat, return to Phase 1
	SWOT: Synthesize into a SWOT	KPIs: Select measures – key performance indicators			



Roles by Phase

<u>Strategic Planning Process Phase</u>	<u>Who Should be Involved?</u>
Getting Started	CEO/Owner + Executive Team Strategic Planning Leader
Phase 1: Discover your purpose and desired future	CEO/Owner + Executive Team Strategic Planning Leader Planning Team (All Staff if doing survey)
Phase 2: Assess your strategic position	CEO/Owner + Executive Team Strategic Planning Leader + Planning Team Department Managers All Staff (if doing survey/assessment) Customers and Suppliers
Phase 3: Develop your strategies and priorities	CEO/Owner + Executive Team Strategic Planning Leader + Planning Team
Phase 4: Cascade your strategies to operations	Executive Team (including Finance Leader) Strategic Planning Leader + Planning Team Department Managers
Phase 5: Align your people and financial resources	Strategic Planning Leader Department Managers Planning Team (including Finance, HR, Marketing teams)
Phase 6: Execute your plan	CEO/Owner + Executive Team Strategic Planning Leader + Planning Team HR Team and Department Managers Everyone else (by department)

Setting an effective agenda that results in the outcomes you are seeking

AGENDA SETTING

- ⑥ Start with outcomes first, then build the agenda.
- ⑥ Thinking about...
 - Where are we now?
 - Where are we going?
 - How are going to get there?
- ⑥ In your goal setting think...
 - Incremental
 - Substantive
 - Transformational
- ⑥ Project timeframes, but don't stick to them.
- ⑥ Clarify decisions.
- ⑥ Bring into the meeting what you will need to make decisions – emphasize the pre-work.

Must-dos to move from flip charts to putting your plan into action

THE DAY AFTER YOUR RETREAT

- ⑥ Speed, speed, speed.
- ⑥ Have a follow up meeting.
- ⑥ Review and revise decisions after you have had a chance to let them sit.
- ⑥ Determine your business process owner, system and schedule.
- ⑥ Book your strategy reviews.
- ⑥ Close the loop.

How to facilitate and participate at the same time

FACILITATING YOUR OWN STRATEGIC PLANNING RETREAT:

Put on your hat



Any insights you would like to share related to one of today's topics?

What are some strategy or execution questions you would like to discuss?

- ⑥ 9am PT on Wed, January 26th
- ⑥ Send in questions for the next Strategy Huddle to admin@mystrategicplan.com (reference the Strategy Huddle in the subject line)
- ⑥ Interested in sharing/presenting a best practice as a Strategy Leader? (send email to admin@mystrategicplan.com and reference the Strategy Huddle in the subject line)
- ⑥ Follow us on Facebook & Twitter @MyStrategicPlan
- ⑥ Today's session is being recorded and a follow-up email this week will include a link to this huddle as well as the supporting slides.

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Our office hours are Mon-Fri 9am-5pm (PT).