

Welcome Strategy Leader!

During this six-week workshop we will help you create an actionable 2015 strategic plan that will drive engagement among key stakeholders, create alignment around strategic priorities, and inspire accountability for performance. Each week, we will provide the resources, training, and guidance you need to close the gap between strategy and execution.

Session #1: Getting Started

Leader Lesson on 11/3 (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 on 11/9 (90 minutes)

- Organizational perspective
- Customer perspective
- Environmental, industry, and market perspectives
- Create a SWOT
- Customer segmentation

Team Planning Activities (2-3 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 on 11/16 (90 minutes):

Mission, Values, and Vision
Competitive advantages
Organization-wide strategies

Team Planning Activities (3-4 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 11/25 (90 minutes):

Processing your SWOT
Strategic objectives
SMART goals
Organizational goals

Team Planning Activities (3-4 hour planning session):

Complete strategic objectives, SMART organization goals, and organization-level Key Performance Indicators

Leader Session on 12/1 (90 minutes):

Identifying Key Performance Indicators
Cascading goals
Budget

Team Planning Activities (3-4 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 on 12/8 (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
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