

## 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 11/6 (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 11/13 (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 11/20 (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 12/4 (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 12/11 (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 12/18 (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