



## Six-Week Strategic Planning Workshop



### 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