

Agenda Strategic Planning

1-1/2 Day Strategic Planning Engagement

Day One:

Begin Time	End Time	Description
9:00	9:50	Positive Focus

Learning Objective: Participants will recognize the positive accomplishments made by the firm and in their personal lives over the specified period. Purpose is to shift focus from negative thinking (“look at all our problems”) to positive thinking (“Look at what we’ve accomplished!”)

Measurement Tool: Each individual will prepare a personal list of positive accomplishments, then share those list items with the group.

Begin Time	End Time	Minutes	Description
10:00	10:50	50	DOS – Dangers, Opportunities, and Strengths

Learning Objective: Participants will identify the key Dangers, Opportunities, and Strengths facing the firm and thus impacting the development of Strategic Objectives.

Measurement Tool: Each individual will create a personal list of Dangers, Opportunities and Strengths, and then will share those with the group. The group will then reach consensus on the top three items in each category.

Begin Time	End Time	Minutes	Description
11:00	11:50	50	Growth Strategies

Learning Objective: Participants will recognize that the only options for a business are growth or stagnation; the successful maintenance of an unchanging status quo is not a long term option. This necessity for growth will impact the selection of Strategic Objectives for the firm.

Measurement Tool: Each participant will complete the “10 Times Growth Model” from both firm and personal perspectives, then share those lists with the group. Group will achieve consensus on the most important attributes.

Begin Time	End Time	Minutes	Description
1:00	1:50	50	Vision, Mission, and Core Value Statements

Learning Objective: Participants will formulate a Vision, Mission, and Core Values statement for the firm.

Measurement Tool: Each participant will begin with a draft statement (3 each), modify the draft as they believe necessary, and then the group will achieve consensus on three revised statements.

Begin Time	End Time	Minutes	Description
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2:00	3:50	100	Strategic Objectives
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Learning Objective: Participants will develop three to five Strategic Objectives for firm. These Strategic Objectives will provide the basis for the remainder of the Strategic Plan

Measurement Tool: Each participant will be provided a template for the strategic plan and develop their own list of Strategic Objectives. Then in group discussion the team will achieve consensus on the final list for inclusion in the plan. These will be entered into the working template of the draft plan.

Day Two:

Begin Time	End Time	Minutes	Description
9:00	9:50	50	Review Strategic Objectives

Learning Objective: Participants will confirm decisions made previously about Strategic Objectives for the firm.

Measurement Tool: Each participant will have (or view) the Strategic Objective statements developed in the previous step. Group will re-confirm consensus on wording and relative sequence.

Begin Time	End Time	Minutes	Description
10:00	11:50	100	Develop Action Initiatives

Learning Objective: Participants will develop Action Initiatives required to make progress toward the Strategic Objectives of the firm. These initiatives will be measurable and achievable activities which can be translated into individual tasks later.

Measurement Tool: Participants will be divided into workgroups, each to take responsibility for devising Action Initiatives for one of the Strategic Objectives. Each workgroup will develop their lists, and then share those lists with the whole team. Group will achieve consensus on final wording for each initiative which will then be transferred to the Strategic Plan.

Begin Time	End Time	Minutes	Description
1:00	1:50	50	Assign Due Dates and Responsibilities

Learning Objective: Each Action Initiative will be assigned a Due Date and a Responsible Individual. This establishment of accountability is essential for task accomplishment.

Measurement Tool: Each participant will take part in a group discussion of dates and responsibilities. Assignments will be placed onto the template for the Strategic Plan.

Begin Time	End Time	Minutes	Description
2:00	2:50	50	Introduce 90 Day Game Plan

Learning Objective: Group responsibilities, as assigned by the Strategic Plan, will be translated into individual tasks to be accomplished and listed on a 90 Day Game Plan.

Measurement Tool: Each participant will complete an individual 90 Day Game Plan reflecting his/her tasks as developed from the Strategic Plan. These lists will be shared with the entire team. Dates will be set for an Accountability Review to evaluate accomplishments of these tasks and prepare the following 90 Day Game Plan.

SAMPLE ONLY