

Soft-Train



*At Soft-Train
Technology Works*

Team-Based Strategic Planning (3 Days)

COURSE GOAL: How to structure, facilitate, and implement the process.

PREREQUISITES: None

LEARNING OBJECTIVES:

Upon completion of this course, the student will be able to:

- Structure the process so it custom fits their company
- Effectively facilitate the process of:
- keep meetings on track,
 - train others in planning skills,
 - document decisions made at meetings, present and
 - communicate the plan

KEY TOPICS:

I. The Strategic Planning and Change Process

- A. The Traditional Strategic Planning Process
- B. Whose Job Is It? An Overview of Roles and Responsibilities
- C. Demystifying the Process: The Four Phases of Change
- D. What Facilitators Do
- E. Tailoring the Process to Your Organization
- F. Preparing the Organization: Getting Buy-In and Developing Skills for Strategic Change

**II. The Nuts and Bolts:
Facilitating the Process Step by Step:**

- A. Situation Analysis: What It Is, How It's Done, Who Does It
- B. Expanded Analysis
- C. Facilitator's Guide I: Priority-Setting Meeting-Facilitating Agreement on Strategy and Strategic Priorities
- D. Strategy Meeting Prewrite
- E. Facilitator's Guide II: Strategy Meeting---Guiding the Tem to Consensus on Each Part of the Plan

III. Implementing the Plan:

- A. Making the Plan Operational
- B. Keeping the Plan on Track

C. After the First Plan:
Updating and Improving
With Much Less Pain

D. Five Years of Planning:
Benchmarks of
Accomplishment

IV. Team Processes

A. Effective Teams and
Productive Team Members

B. Facilitator's Guide III:
Techniques for Team Tasks

C. Unstopping Typical
Blockages

D. Summary: Lessons for
Success