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Don Murray & Associates

## Conducting Your Strategic Planning Offsite: Keys to Success

More than a few strategic planning efforts run aground because of the failure to correctly plan and implement. Key leaders from board and management go in with good intentions, but end up shooting themselves in the foot.

*How does this happen?*

Having facilitated dozens of strategic planning offsites over the years, we've identified five keys to success in the planning, design, implementation and follow-up of your plan.

### 1. Clarity of Purpose

"Those who fail to plan, plan to fail!" Of course, most boards heed this advice, and spend time and energy creating plans for the near and long term. We all need some kind of planning to reach our goals. A goal without a plan is just a wish.

Board and management must have a clear sense of direction and purpose, as well as validation of that purpose by the board. This in turn helps the organization pull together with commitment and consensus to do what needs to occur in the future. Having a clear mission, vision, and operating plan is like setting your compass to the North Pole: everyone knows where you're headed and this aligns energies in the same direction.

### 2. Careful Preplanning

A typical offsite begins weeks ahead with a series of steps that include:

- Development of a proposal with phases and stages of events along the process
- Creation of an empowered board and management executive committee to review and approve this proposal
- Preliminary interviews to gather data on the current status of the organization, and anticipated goals and strategies
- Blueprint for follow-up activities that will convert concepts into action plans.
- Decide to hire an internal or external meeting facilitator to help achieve desired outcomes.

### 3. Skilled Facilitation

Although some boards use an internal facilitator, in our experience this is risky. If there's ever been a time when you need someone from outside to create a cohesive process, guiding participants through challenging conversations and decisions, this is it! For the most honest and helpful insights prior to the meeting, it's best to have an external facilitator conduct the preliminary interviews.

When selecting a facilitator, choose someone with ample skill in guiding group interaction and a general understanding of your industry.

## 4. Sequenced Agenda

A well designed strategic planning meeting usually includes these phases:

- **Set the stage:** The key leaders of the group conduct opening remarks to put the meeting in context: Why are we here? What do we hope to gain?
- **Choose groundrules:** After sharing goals and expectations, the strategic planning team creates their operating groundrules for the meeting including desired level of candor and degree of confidentiality.
- **Set direction:** After reviewing the preliminary interview data on the current situation, the participants conduct problem solving discussions that culminate in a five-year vision, major strategic initiatives, and one year operating goals.
- **Make decisions:** Using a decision matrix tool, the participants create consensus agreement to support the vision, major strategies, and annual goals.
- **Critique and debrief:** To capture the learning from the event, participants ask closing questions such as, "What went well?" and "How can we make these kinds of meetings even more successful in the future?"

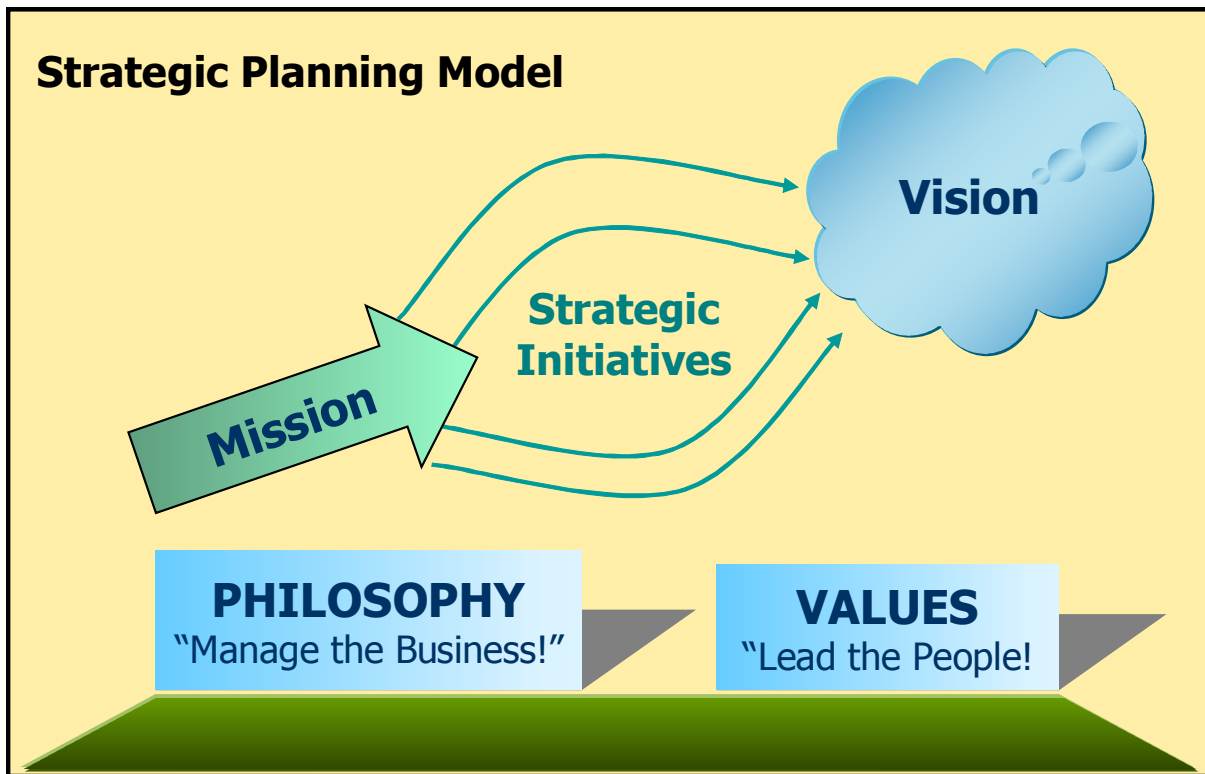
## 5. Empowering Strategy to Action

One of the best measures of a successful strategic planning workshop occurs when the organization's CEO convenes the management team to build a one year operating plan. This plan should move the organization forward along each of the board-approved major strategic initiatives. Once this operating plan has been presented and approved, the organization is ready for budgeting: how to fund the desired strategic direction of the organization.

### Summary

It is important to understand the limitations as well as possibilities of strategic planning. The strategic plan is much more than a wish list, report card, or marketing gimmick. It is not a quick cure. What a well designed strategic plan can do is shed light on the organization's unique strengths and relevant weaknesses, enabling it to pinpoint opportunities. If the board and senior management commit to its implementation, making it a working, living document that guides action, the strategic plan becomes an invaluable blueprint for long-term growth and revitalization.

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**Mission:** Statement of core purpose; what you do for whom and why

**Vision:** Compelling picture of your organization some five years in the future

**Strategies:** Major initiatives needed to achieve the goals

**Goals:** Measurable milestones of progress toward the vision

**Values:** Strongly held philosophy and beliefs you are willing to publish and be held accountable to