

SECRETS TO FACILITATING STRATEGY

Take a facilitative approach to building a successful strategy!

WHY IT WORKS:

Part I: Learning Strategic Planning (Online)

At your own pace, take the 4-6 hour online course to learn the Drivers Model - the Leadership Strategies comprehensive approach to strategic planning. Score 80% or above on the certification test to begin Part II.

Part II: Facilitating Strategy Sessions

Now that you know the model, join the other participants for a focused, three-day session to learn facilitation best practices and key techniques for working with strategy teams.

LEARN HOW TO:

- Get a team to visualize the future
- Facilitate a team in developing mission and vision statements
- Differentiate goals from objectives
- Create positioning statements
- Establish guiding principles
- Isolate critical success factors and barriers to success
- Develop action plans for implementation
- Design a communications plan
- Implement a monitoring strategy and accountability
- Avoid the ten pitfalls to developing a plan

IDEAL FOR:

Facilitators, consultants, strategic planners, business analysts, project managers, HR professionals

DURATION:

Part I (Online): 4-6 hours self-paced
Part II: 3 days

SPECIAL FEATURES:

- Online course with certification test
- Workbook chock-full of tips and strategies
- Detailed facilitation guide giving you the step-by-step process with sample words, engagement strategies, starting questions, and a sample deliverable
- CD with handouts and briefings to get you started right away
- Three practice sessions to provide you the confidence you need

AGENDA

Part I

SELF-PACED

Overview of Strategic Planning

Developing a Plan

Preparing to Plan

Implementing the Plan

Part II

DAY 1

Getting Started

The Management Briefing

Facilitating the Management Briefing

DAY 2

Review

The Situation Assessment

Facilitating Strategic Direction Setting

DAY 3

Review

Facilitating Implementation Planning

Facilitating a Monitoring Session

PART I - LEARNING STRATEGIC PLANNING (Online)

Need to learn about strategic planning but don't have time for a traditional classroom course? Get started in hours, not days, with **Springboard Online!**, the latest in online learning from Leadership Strategies – The Facilitation Company.

Learn strategic planning at your own pace!

- Combines audio and graphics to keep your interest high
- Interactive quizzes throughout to ensure learning as you go
- Chock-full of success strategies and quality checks to help you build your plan
- Online certification exam with randomized questions

You must score 80% or above to be certified to take Part II. This ensures that all participants in Part II understand the strategy model and are ready to focus on the key facilitation strategies. You can review the online material and take the certification exam as often as you need prior to the Part II session.

PART I CONTENT

Overview of Strategic Planning

- The Level 3 Leader
- The Drivers Model
- The Components of a Strategic Plan
- The Strategic Questions
- The Three Levels of Planning
- The Ten Pitfalls to Avoid in Planning

Developing the Plan

- Mission and Vision – The Difference
- Converting Values into Guiding Principles
- Defining Your Goals
- Positioning Strategies
- Establishing SMART Objectives
- Identifying Critical Success Factors
- Removing Barriers
- Developing Strategies
- Prioritization and Action Planning

Preparing to Plan

- The Sigmoid Curve and Paradigms
- Steps for Preparing for the Plan
- Selecting Planning Team Members
- Developing the Situation Assessment
- Measuring Customer Satisfaction
- Employee Views and Culture
- Competitor Analysis
- Industry Trends
- Key Situation Statistics
- Critical Assumptions
- Developing the SWOT

Implementing the Plan

- Gaining Buy-in
- The Communications Plan
- Monitoring the Plan
- Grading Your Progress

PART II - FACILITATING STRATEGY SESSIONS

In this segment, you join the other participants for a three-day session focused on strategies for facilitating teams through strategic planning. Techniques from *The Effective Facilitator* serve as the building blocks for the session. Therefore, taking this course in advance is helpful but not required.

Using a detailed facilitator guide, you and your classmates will facilitate a fictitious company, "The Light Touch Company," through the development of a three-year strategic plan. Through the various role plays, you will have opportunities to...

- See the various components of the strategy model facilitated live
- Use the detailed facilitator guide to assess your skills in facilitating strategy teams
- Understand the issues that typically arise in facilitating strategy
- Share your experiences and learn from the experiences of others in facilitating strategic planning

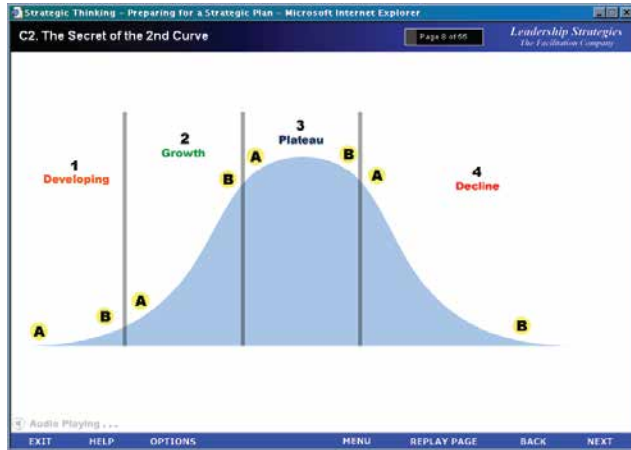
Facilitating the Session – A Detailed Facilitator Guide

- Techniques for engaging the group right from the beginning in strategic issues
- Tips for educating the group while facilitating the strategic plan development
- When and how to use breakout groups for the various strategy components
- In-class practice sessions in facilitating the strategy model
- Sharing experiences in strategic plan facilitation

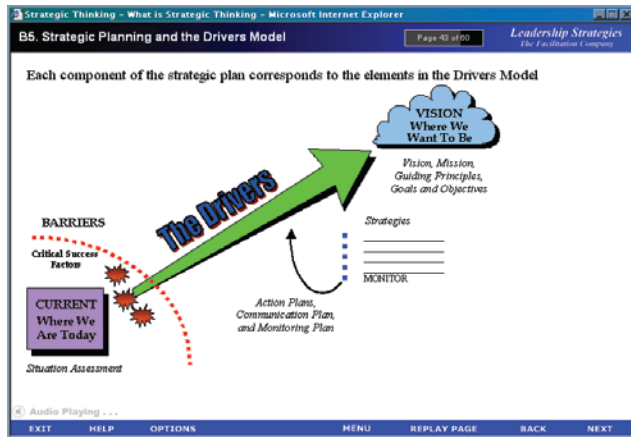


PART I & II FEATURES

The Sigmoid Curve helps you recognize when to develop your next product ...



The Drivers Model helps you understand Strategic Thinking

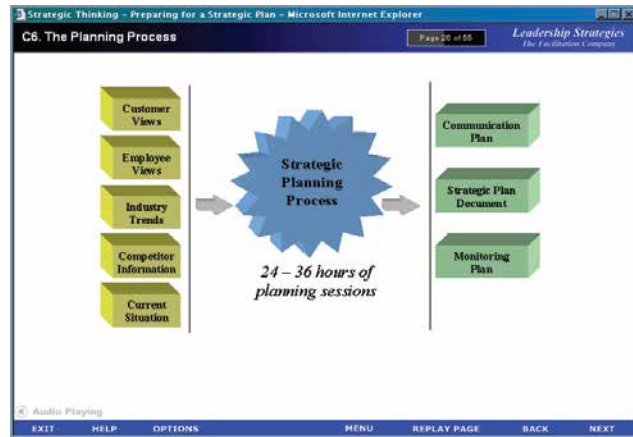


Get specific definitions ...

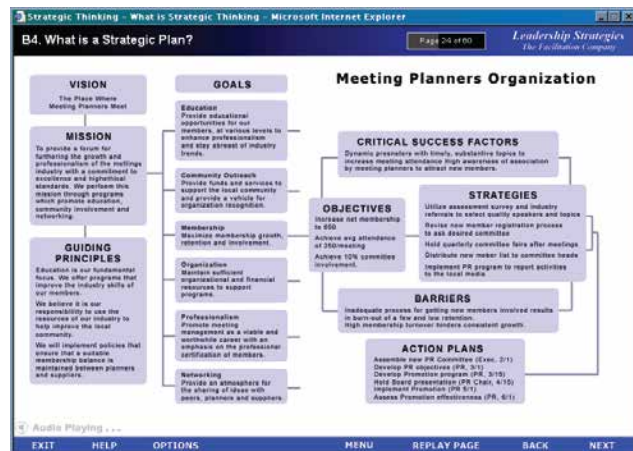
Component	Definition
Vision	A picture of the "preferred future"; a statement that describes how the future will look if the organization achieves its ultimate aims. <i>"The vehicles of choice for a value-focused world"</i>
Mission	A statement of the overall purpose of an organization. Describes what you do, for whom you do it, and the benefit. <i>"Our mission is to provide the consumer with high quality, price competitive automobiles to meet their transportation needs."</i>
Guiding Principles	General guidelines which set the foundation for how an organization will operate. <i>"Responsiveness to consumer needs will be a first priority in our operations. Therefore we will..."</i>
Goals	Broad, long-term aims that define accomplishment of the mission. <i>"Profitability - Maximize net income by increasing revenues and controlling costs."</i>
Objectives	Specific, quantifiable, realistic targets that measure the accomplishment of a goal over a specified period of time. <i>"Increase revenues by 12% in 1993. Limit increases in overhead costs to 2% in 1993. Achieve a 3% reduction in management staff through increased automation."</i>

... While Paradigm Shifts alert you to impending change – don't get left behind!

Learn what to do before, during, and after the planning process



... And a concise layout for your plan.



PART I & II FEATURES (continued)

The interactive quizzes check your learning as you proceed ...

C11. Test Your Understanding

What are the key elements that make up the Situation Assessment?

- Monitoring Plan, Communications Plan, and Strategic Planning Document
- Customer Views, Employee Views, Competitor Information, Industry Trends, and Current Situation
- Key Statistics, Existing Targets/Performance Objectives, and Existing Strategies/Initiatives

Click the button next to the correct answer.

Detailed instructions get you started.

D6. Success Strategies - Objectives

1. Determine the "yardsticks or measures." Measures focus on RESULTS not activities. Read the Goal carefully and ask yourself, "At the end of each year, what will measure whether or not we have been successful?"

Goal: We will ensure a safe and disciplined environment for all members of the school community.

Good Measures	Poor Measures
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The number of accidents in the schools <input checked="" type="checkbox"/> The number of violent incidences in the schools <input checked="" type="checkbox"/> The number of facilities that meet system-wide standards 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> The number of police officers assigned to schools <input checked="" type="checkbox"/> The number of building audits held

... while the final exam certifies your ability to apply your knowledge.

Evaluating Goals

What is wrong with the following goal? Choose the best answer.

Eliminate three staff positions and re-negotiate the office lease

- Not broad and infinite
- Not specific / Intentions are not clear
- Too specific / It is a strategy, not a desired result
- None of the above, or nothing is wrong

Quality checks help you succeed.

D6. Quality Check - Objectives

Are the Objectives SMART?

- S**PECIFIC
- M**EASURABLE
- A**CHIEVABLE
- R**ELEVANT
- T**IME-BOUND

Do the objectives measure results and not just activity?

Objective Verbs	Strategy Verbs
Increase	Establish
Reduce	Develop
Achieve	Implement
Maintain	Revise
Have	Utilize

If all of the objectives are achieved, will the goal be accomplished?

