

STRATEGIC PLANNING WORKSHOPS

What Game are We Playing?	What Does Winning Look Like?	Select and Refine Strategic Options	Review and Commit to Plan	Cascade to Organization
<ul style="list-style-type: none"> • Current situation • New learnings – customer, market, etc. • Identify external drivers and internal gaps and resulting strategic implications 	<ul style="list-style-type: none"> • Winning aspiration • Where to play • How to win • Define what winning looks like • Brainstorm strategic options and initiatives to close gaps vs. what winning looks like 	<ul style="list-style-type: none"> • Select highest value initiatives • Iterative process to refine initiatives and determine “how” to achieve including actions, organizational gaps, KPIs, budget, etc. • Test and validate strategic choices 	<ul style="list-style-type: none"> • Complete and consolidate strategic initiative plans • Organizational review • Develop financials 	<ul style="list-style-type: none"> • Develop communication plan • Cascade KPIs and strategic initiatives to organization • Develop detailed actions plans • Process to monitor and track performance

7 WORKSHOPS	STRATEGIC PLANNING WORKSHOP DELIVERABLES (ON-SITE OR VIRTUAL)
1. KICKOFF	Review prior year strategic initiatives and progress to date Deep dive on pre-work completed to date and gaps to fill Initial alignment on target segmentations Update action plan and timelines
2. WORKING SESSION (EXTERNAL DRIVERS)	Leadership team working session What game are we playing? External drivers and strategic implications What does winning looks like?
3. PREPARATION	Prepare strategic initiatives Refine segmentations, strategic plan, and set up slides Coach initiative owners & support on segmentation and strat plan build
4. WORKING SESSION (GAP ANALYSIS)	Leadership team working session Review strat plan set ups: segmentation, research, etc. Review strategic initiatives: QC content: org capacity, capability, and budget implications Gap analysis & next steps
5. STRATEGIC INITIATIVES	Complete strategic initiatives Develop strat plan financials Assemble draft strat presentation Coach on strategic initiatives & support on plan financials & draft presentation
6. WALKTHROUGHS	Strat plan walkthrough Financials review Gap analysis and next steps
7. FINALIZE PLAN	Final plan presentation Organizational review and action plan Strategy deployment plan and cadence of review

WHAT IS STRATEGIC PLANNING?

- Strategic planning is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy. Strategy is an integrated set of choices that positions a firm to win. The firm chooses to do some things—and not others—based on a data-driven process that reveals and compares alternative paths. The objective of Strategic Planning is to gain sustainable advantage over rivals.

WHAT IS THE STRATEGIC PLANNING PROCESS?

Strategic Planning sets the road map of what you want to achieve



A TYPICAL PLANNING CYCLE



HOW DO I GET STARTED?

REGISTER FOR AN OPEN COURSE AT LEAN TRANSFORMATION ACADEMY

- Workshops should involve the senior leaders of an organization, and any key employees, who can actively contribute to the long-term planning of the organization.
- Participants will engage in a hands-on workshops (in-person or virtual)
- Hands-on training in the Strategic Planning Process with applied tools towards real initiatives.

SCHEDULE WORKSHOPS TO ESTABLISH THE "STRATEGIC PLANNING PROCESS" AT YOUR COMPANY

- Workshops should involve the senior leaders of an organization, and any key employees, who can actively contribute to the long-term planning of the organization.
- Up to 12 participants in a virtual training or up to 30 participants in on-site workshops to gain hands-on training with the Strategic Planning process.

SIGN UP AT: [LEANFOCUS.COM/LEAN-TRANSFORMATION-ACADEMY](http://leanfocus.com/lean-transformation-academy)

REQUEST A CONSULT WITH: APRIL.LEE@LEANFOCUS.COM

STRATEGY DEPLOYMENT WORKSHOP

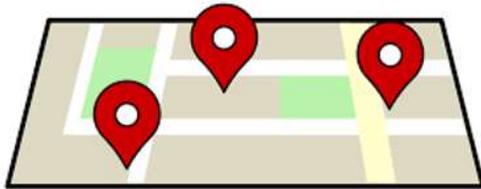
MAKE YOUR STRATEGIC
PLAN ACTIONABLE

CLEARLY UNDERSTAND
YOUR IMPROVEMENT
PRIORITIES

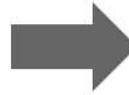
MEASURE & SET
TARGETS

BUILD ACTION PLANS &
REVIEWS THAT DRIVE
ACTION & RESULTS

Strategic Planning sets the road
map of what you want to achieve



Strategy Deployment is how you
will deliver the Strategic Plan



What KPIs will
tell you whether
you're on track?



What resources
are needed?



Who are the owners, how
are they incentivized &
what are the necessary
skills to drive the actions?



What is the vehicle & timing to
carry your actions forward?

LEAN FOCUS STRATEGY DEPLOYMENT BOOT CAMP AGENDA (EXAMPLE):

5-DAY AGENDA	DESCRIPTION
DAY 1	What is Strategy Deployment / History Process / Mechanics / Tools / Templates Success Factors / Leadership Expectations
DAY 2	Level 1 Matrix development Breakthrough objectives, improvement priorities, metrics
DAY 3	Level 2 Matrix development Breakthrough objectives, improvement priorities, metrics, action plans / A3
DAY 4	Obeya room development Leadership review process / cadence
DAY 5 (1/2 DAY)	Calendarize reviews for the annual cycle Strategy deployment operations review Key learnings / takeaways



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THE STRATEGY DEPLOYMENT MATRIX

Strategy Deployment Matrix - L1										Lean Focus										
										1. 5th Improvement Priority										
										4. 4th Improvement Priority										
										3. 3rd Improvement Priority										
										2. 2nd Improvement Priority										
										1. 1st Improvement Priority										
W1 - 5th priority breakthrough (flow month this year)	W1 - 4th priority breakthrough (flow month this year)	W1 - 3rd priority breakthrough (flow month this year)	W1 - 2nd priority breakthrough (flow month this year)	W1 - 1st priority breakthrough (flow month this year)						<p>Top Improvement Priorities</p> <p>Annual Objectives [1 Year]</p> <p>Breakthrough Objectives [3-5 Years]</p> <p>Targets to Improve (TTI)</p>	TT1 - 1st priority (flow month by school)	TT1 - 2nd priority (flow month by school)	TT1 - 3rd priority (flow month by school)	TT1 - 4th priority (flow month by school)	TT1 - 5th priority (flow month by school)	Name 1	Name 2	Name 3	Name 4	Name 5
											2. 1st Priority Breakthrough									
											3. 2nd Priority Breakthrough									
											4. 3rd Priority Breakthrough									
											5. 4th Priority Breakthrough									
										5. 5th Priority Breakthrough										

WHAT DIFFERENTIATES STRATEGY DEPLOYMENT FROM DAILY MANAGEMENT?



DAILY MANAGEMENT IS USED TO DRIVE THE DAY-TO-DAY OPERATIONS OF A BUSINESS (THINK 1-YEAR OBJECTIVES) VS. STRATEGY DEPLOYMENT, WHICH DRIVES YOUR HIGHEST LEVEL STRATEGIC OBJECTIVES & IMPROVEMENT PRIORITIES THAT WILL CREATE LONG-TERM COMPETITIVE ADVANTAGE (THINK 3-5 YEAR OBJECTIVES).

EACH REQUIRES UNIQUE FOCUSED IMPROVEMENTS, PERFORMANCE METRICS, AND RESOURCE PLANNING.

HOW DO I GET STARTED?

REGISTER FOR AN OPEN COURSE AT LEAN TRANSFORMATION ACADEMY

- Ideal for individual registrants who lead major departments/initiatives or Continuous Improvement leaders
- Participants will engage in a 2-day Strategy Deployment session. Complements subject matter learned in the Problem-Solving/Daily Management 3-day course.
- Understand Strategy Deployment and apply to a Case Study Matrix

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SCHEDULE AN ON-SITE WORKSHOP OR HAVE LEAN FOCUS HOST AT THE ACADEMY

- Ideal for on-site team-based Strategy Deployment with Senior Leaders and process owners. Ideal for Leadership teams & Managers.
- Up to 30 participants in a 5-day Strategy Deployment Boot Camp to learn, apply to a real L1 matrix, and drive next step Action Planning.

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