

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

## WORKSHOPS (ON-SITE OR VIRTUAL OPTIONS AVAILABLE)

7 WORKSHOPS	DELIVERABLES
1. KICKOFF	<ul style="list-style-type: none"> <li>Review prior year strategic initiatives and progress to date</li> <li>Deep dive on pre-work completed to date and gaps to fill</li> <li>Initial alignment on target segmentations</li> <li>Update action plan and timelines</li> </ul>
2. WORKING SESSION (EXTERNAL DRIVERS)	<ul style="list-style-type: none"> <li>Leadership team working session</li> <li>What game are we playing?</li> <li>External drivers and strategic implications</li> <li>What does winning look like?</li> </ul>
3. PREPARATION	<ul style="list-style-type: none"> <li>Prepare strategic initiatives</li> <li>Refine segmentations, strategic plan, and set up slides</li> <li>Coach initiative owners &amp; support on segmentation and strat plan build</li> </ul>
4. WORKING SESSION (GAP ANALYSIS)	<ul style="list-style-type: none"> <li>Leadership team working session</li> <li>Review strat plan set ups: segmentation, research, etc.</li> <li>Review strategic initiatives: QC content: org capacity, capability, and budget implications</li> <li>Gap analysis &amp; next steps</li> </ul>
5. STRATEGIC INITIATIVES	<ul style="list-style-type: none"> <li>Complete strategic initiatives</li> <li>Develop strat plan financials</li> <li>Assemble draft strat presentation</li> <li>Coach on strategic initiatives &amp; support on plan financials &amp; draft presentation</li> </ul>
6. WALKTHROUGHS	<ul style="list-style-type: none"> <li>Strat plan walkthrough</li> <li>Financials review</li> <li>Gap analysis and next steps</li> </ul>
7. FINALIZE PLAN	<ul style="list-style-type: none"> <li>Final plan presentation</li> <li>Organizational review and action plan</li> <li>Strategy deployment plan and cadence of review</li> </ul>



# STRATEGIC PLANNING WORKSHOPS

## WHAT IS STRATEGIC PLANNING?

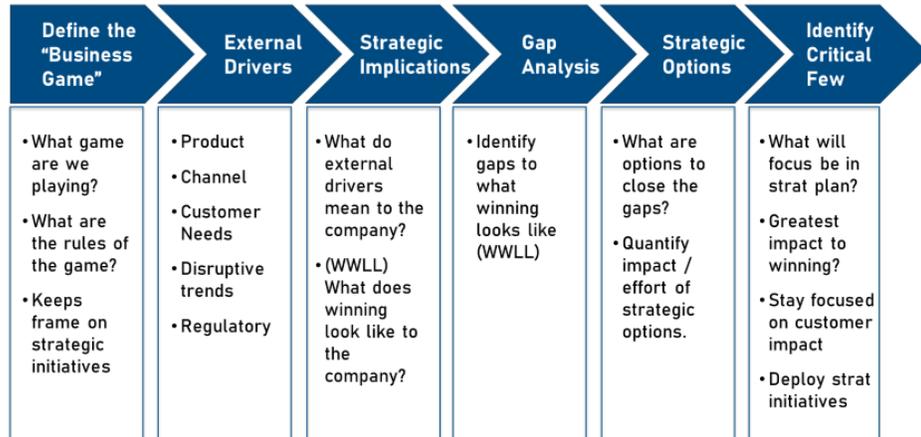
- Strategic planning is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy.
- Strategy is an integrated set of choices that positions a firm to win. The firm chooses to do some things—and not others—based on a data-driven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



REQUEST A CONSULT:  
INFO@LEANFOCUS.COM

## How do I get started?

Schedule a Strategic Planning Workshop

Take the first step toward workspace transformation. Contact us today to schedule a consultation and discover how Strategic Planning can elevate your organization's operations.



(630) 800-8519 | leanfocus.com

© Lean Focus LLC | All Rights Reserved



**GROWTH**  
A LEAN FOCUS PRACTICE AREA