



Session Title: Where Are We Going and How Do We Get There? Conducting Strategic Planning and Executing a Successful Strategy

Session Summary:

A solid strategy is the cement and mortar in the foundation of any successful organization, yet many organizations don't have a detailed and actionable strategy developed. If they do have the strategy developed it often lacks the actionable components for success.

In today's rapidly evolving business environment, organizations are often forced to remain competitive by adapting a culture of rapid change, yet all too often the strategy is not updated to reflect these changes. Developing, updating and communicating the organizations' strategy frequently doesn't occur.

New product and service developments, increased or decreased growth, or other external environmental factors may have led the organization to change direction and stray from the strategy. Creating and or updating a detailed strategy is often forgotten. So why is strategic planning important? Why conduct strategic planning? What are the components of development and execution of a successful strategy?

This program will teach participants:

- So why conduct strategic planning?
 - Plan for change
 - Manage for results
 - Provide customer support
 - Increase adaptability
 - Promote communication
 - Guide management decisions
 - Remain future-oriented
- What should be considered in developing a solid strategy
- What are the key components of a solid strategy
- Who should be involved in strategic planning and how should they be involved
- How should the strategy be introduced and implemented
- How often should strategic planning occur and what should you consider it during the implementation process
- Tools, tips and templates for developing a mission, vision and strategic components including communication and change planning tools

Session Description & Learning objectives:

- Where are we now?
 - Internal/external environmental assessment
 - Customer and stakeholder identification
- Where do we want to be?
 - Mission
 - Vision
 - Targets
 - Initiatives
 - Objectives
- How do we measure our progress?
 - Performance measures and Key Performance Indicators (KPIs)
- How do we get there?
 - Supporting strategies and initiatives
 - Action plans
 - Tracking system
- Provide participants with the components of an actionable and successful strategy including mission, vision, targets and measures
- Offer participants with a starting point, list of considerations, prior to beginning strategic planning
- Provide real life examples of a successful strategic planning process that can be used as a model for guiding the development and implementation of a new mission, vision and strategy
- Provide a foundation of understanding for the unique and sometimes daunting task of implementing, developing and or updating a strategy and conducting strategic planning
- Offer an overview of strategic planning including definitions of specific terminology often used in the strategic planning process
- Teach participants the importance of having a communications and change approach as part of strategic planning and highlight a sample methodology
- Inform participants of some of the possible roles and responsibilities changes that may occur associated with strategic planning
- Highlight some of the pitfalls and challenges of a strategic planning and offer tips for success for both leaders and employees

What need, problem or issue the session addresses:

Often organizations are not certain where to start and what to include when conducting strategic planning. The session will provide a process to participants for asking and answering certain questions necessary for successful strategic planning. This session will address the strategic planning process, where to begin, what to include, and how to execute, implement and measure strategic changes. The components of a solid strategy will be provided, including a focus on both internal and external factors.

Expected take-aways for the participants-what they will learn and how they will benefit:

At the end of the workshop, participants will have a process for conducting strategic planning and implementing a strategy. They will receive tips of how some organizations have successfully overcome

the challenges of strategic planning and implementation. Participants will benefit from leaving the session, with a process, tools and templates used with success in past strategic planning efforts, and an overall high level approach (inclusive of a change management and communications process) for strategy development and strategic planning.

Lead Contact (Presenter/Facilitator):

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Session Details:

- Preferred Format: Face to Face (short version can be customized for virtual delivery)
- Length: Offered in short and extended formats – 2 hour and 4 hour workshops, additional customization is available
- Maximum number of participants: Various depending on desired organizational outcomes and format

Content Focus:

- Strategic Planning
- Mission and Vision Development
- Change Management
- Strategic Communication
- Leadership Development
- Process and Requirements Definition
- Team Performance

Biography:



Facilitator: Scott Span, MSOD, is President of [Tolero Solutions](http://www.tolerosolutions.com), an Organizational Development and Change Management consultancy. Tolero Solutions specializes in developing people and organizations to be more responsive, focused and effective to facilitate sustainable growth. Scott successfully delivers organizational improvement solutions to staff teams, individuals and organizations in multiple areas including change management, with a focus on the integration of people and technology, culture change, leadership development, engagement, retention, performance and sustainability. He has He is an author on various topics of organizational development and the creator of the [Recruitment and Retention Lifecycle™](http://www.tolerosolutions.com). His results have not only helped achieve desired goals, but have also increased personal growth and development, leading to a more efficient and effective work environment. He holds a Masters in Organization Development (MSOD) from American University and the NTL Institute. He is also certified in the (FIRO-B) FIRO Element B behavior instrument powered by The Human Element. Additionally he holds Process Mapping and Balanced Scorecard Certifications. He may be reached at scott.span@tolerosolutions.com.
