

Secrets to Facilitating Strategy

Take a facilitative approach to building a successful strategy!



Leadership
Strategies 

Why it Works

Part I: Learning Strategic Planning

At your own pace, take the 1-2 hours to learn the Strategy 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: 1-2 hours, self-paced

PART II: Three Days, In Person

Special Features

- Strategy Model review 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
- Flashdrive 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

Need to learn about strategic planning but don't have time for a traditional classroom course? Get started in hours, not days. By learning our Strategy Model, *in 1-2 hours*.

Learn strategic planning at your own pace!

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