

# Strategic Planning Pro-treat<sup>sm</sup>

Consultation



A recent Gallup Poll survey cited U.S. executives consistently spend 39% of their time strategic thinking and planning. Strategic planning challenges leaders to learn from the past and assess current situations to plan for future success. During our pro-treat<sup>sm</sup>, leaders within an organization participate in an organized process to make decisions on strategies for moving forward and operating pro-actively for future success. To help with the successful implementation of the plan, quarterly reviews are held to discuss progress and results made on achieving the organization's goals.

## Objectives

By completing this 10-step strategic planning process, you will:

- Collect pertinent information to analyze the state of the business in terms of: *Where are we now? Where are we going? How do we get there?*
- Summarize the organization's strengths, weaknesses, opportunities, and threats
- Identify and prioritize the top 10-12 strategic issues facing the organization
- Create or refine the organization's guiding statements: *mission, vision and values*
- Develop a strategic action plan to outline the long-term objectives, short-term goals, and steps for achieving organizational success
- Rally support and commitment for taking responsibility and accountability
- Implement and monitor your strategic plan to determine: *How are we doing?*

## Format

The guiding leaders of an organization participate in a decision-making process that uses data analysis, brainstorming, and prioritizing techniques to create, refine, and monitor their strategic plan.

## Ideal Size

8-24 Key Players

## Length

**Pro-treat<sup>sm</sup>:** 1-2 day, off-site planning session

**Overview:** getting started, 3 hours

## Agenda

1. Plan to plan
2. External analysis
3. Internal analysis
4. Strategic issues
5. Mission and vision statements
6. Philosophy Formulation
7. Strategic action plans
8. Strategic plan roll-out
9. Implement action plans
10. Monitor progress

## Target Audience

Planning team of senior management and board of directors

## Typical Uses

Board of directors and/or management team during annual retreats

## Material Options

- *Strategic Planning Handbook*
- Handout