

## Agenda for Facilitating Strategic Planning in Business

- Program includes nine virtual Modules that participants and faculty schedule ahead of time
- Each module includes:
  1. 1-2 hours of assigned readings from the text and other supplemental materials
  2. 90-minute virtual seminar with faculty and learners to discuss highlights from the readings and to address questions from learners
  3. 90-minute virtual peer coaching with faculty and learners to coach each learner on applications of the content
- Each learner participates in an ongoing private email exchange with faculty and fellow participants
- Each learner documents ongoing learning and actions in the learner's Learning and Development Journal
- Program meets part of the requirements for "Certification in Facilitating Strategic Planning in Business"
- For more information about this program and certifications, see [ConsultantsDevelopmentInstitute.org](http://ConsultantsDevelopmentInstitute.org)
- Each of the following topics is presented in the context of facilitating in a business organization

### Module #1 – Intro to Program

#### **Pre-Readings and Reflections**

Overview of Program  
Overview of Peer Coaching Process

#### **Meeting Activities**

Introductions to faculty and learners  
Team building among learners (as required)  
Review of program agenda and materials  
Overview and practice of peer coaching groups  
Practice using distance learning technologies  
Description of pre-reading before Module #2  
Schedule all future seminars and peer meetings

### Module #2 – Understanding Strategic Planning

#### **Strategic Planning**

What Is Strategic Planning? "Strategic"?  
All Flows from Strategic Planning  
Benefits of Strategic Planning

#### **About Conducting Strategic Planning**

Strategic Planning Framework  
Different Models of Strategic Planning  
Strategic Plans Compared to Business Plans  
Traits of Strategic Planning Process  
Myths About Strategic Planning  
Criteria for Effective Planning and Plans

### Module #3 – Foundations of Facilitation

#### **Your Relationship With Planners**

What Strategic Planning Facilitator Does  
Understand Yourself As Facilitator  
Understand Planners' Business  
How to Work with Diversity  
Get Agreement Between You and Planners  
(this is Contracting phase of consulting process)

#### **Techniques and Challenges**

Procedures for Common Facilitation Techniques  
How To Enhance Group Participation  
How To Manage Conflict and Resistance  
How to Come to Consensus

### Module #4 – Preparation for Planning

What's Real Purpose for This Planning?  
Client Ready for Strategic Planning?  
What Learned in Previous Planning?  
Who's On Planning Committee?  
Scope of Plan? Timespan of Plan?  
Which Planning Model to Use?  
How Make Decisions During Planning?  
How Get "Buy In" to Plan?  
How Ensure Implementation?  
How Train Planners?  
(this is Discovery and Action Planning phases of consulting process)

## **Module #5 – Strategic Analyses**

### **External Analysis**

Environmental Trends?  
Stakeholder Analysis? Customers?  
Competitors? Collaborators?  
What Opportunities and Threats?

### **Internal Analysis**

Quality of Board and Management Functions?  
Quality of Each Program? Processes? Outcomes?  
What Strengths and Weaknesses?

## **Module #6 – Setting Strategic Direction**

### **Strategic Thinking and Strategizing**

Ensure Continued Strategic Thinking  
Discuss Models of Strategic Analyses  
Consider Different Models of Strategizing  
Decide Best Strategies to Follow

### **Setting Strategic Direction**

Clarify Mission, Vision, and Values?  
Define Markets to Pursue?  
Do Business Plan for Each Product/Market?  
Establish Goals Based on Analyses

## **Module #7 – Action Planning and Plan Document**

### **Action Planning**

Develop Action Plans for Each Goal  
Integrate, Align and Reality-Check Actions  
Develop Subordinated Plans  
Develop Operating Budget

### **Develop Strategic Plan Document**

Draft Strategic Plan Document  
Coordinate Reviews and Approval  
Distribute and Communicate Strategic Plan  
Celebrate Completion of Plan

## **Module #8 – Implementation and Change Management**

Support Client With Implementation of Plans?  
Ensure Leadership, Supervision and Delegation  
Support Client to Managing Change?  
Approaches to Ensure Ongoing Implementation  
Tools To Track Status and How to Use Them  
Systematically Adjust Plans As Needed

## **Module #9 – Project Evaluation and Termination, and Closing CDI Program**

### **Project Evaluation and Termination**

Evaluate If Project Achieved Desired Results  
Identify Next Steps for You and Client  
Formalize Termination of Project  
(this is Evaluation and Termination phases of consulting process)

### **Closing This CDI Program**

Sharing reflections from each learner  
Coaching each member to identify next steps  
Commitments among members for the future  
Presentation of certificates and certifications

**Although all learners should read all topics, different learners might choose to be coached on different topics in their peer coaching groups. Learners might choose topics that are currently very interesting to them or that they are applying in their consulting activities – this is the essence of**