

Assessment of Your Knowledge About Facilitating Strategic Planning

Description

The focus of CDI's virtual Series "Facilitating Strategic Planning" is on the core knowledge and skills needed to successfully facilitate strategic planning in any type of organization. Thus, the content of the five courses in the Series is foundational for facilitators and planners, whether they are from for-profits, nonprofits or government agencies, or are working from inside or outside of the organization.

This assessment does not cover all of the information in this Series. However, it includes much of their highlights – enough to give you a useful impression of the breadth and depth of the Series, to help you decide whether the Series would be worth your time. So please take 5-10 minutes now to glance at the questions and come to a conclusion about whether to do the Series. If you have any questions, please email us at info@ConsultantsDevelopmentInstitute.org. Thank you!

(You can enroll in this Series "Facilitating Strategic Planning" from CDI's website: <http://ConsultantsDevelopmentInstitute.org>. See the link "Series and Certificates". Or, you could contact your collaborating organization, if known.)

Facilitating Group Decision-Making and Problem-Solving

1. Who is your real client when facilitating? Why is it so important for you to know the answer to that question?
2. What are at least four items that should be included in a facilitation contract?
3. What is the most appropriate use for facilitation? For coaching? For training?
4. How can you effectively switch between those uses (those roles) without confusing your planners?
5. How would you define "facilitating" to your group members?
6. In the context of facilitation, what does "process", "content" and "neutral" mean? Why is it important to know those terms?
7. What are at least four stages of group development, and how might your facilitation be different in each stage?
8. What is a careful and systematic process to match the style of your facilitation to the culture of your planners?
9. What are at least five structures that need to be in place for any working group to be highly effective?
10. How will you know if you should train your planners on the strategic planning process?
11. How will you know if you should contribute content to their planning?
12. What are at least five different techniques for intervening and when should each be used?
13. What are at least five different techniques to maximize participation in any group?
14. What is at least one complete, systematic process to achieve consensus in groups?
15. How can you distinguish between constructive conflict and destructive conflict?
16. What are at least two techniques for managing destructive group conflict?

An Overview of Sensible Strategic Planning

1. How would you describe strategic planning to your clients? How is it different from program planning? Project planning? Financial planning? Business planning?
2. What are at least three features of powerful strategic questions?
3. How would you define strategic thinking to your clients?
4. How can you ensure that your planners undergo true strategic thinking?
5. What is the most important part of strategic planning?
6. What does it mean to confuse the map with the journey, when doing strategic planning?
7. What are at least two features that will determine if the strategic planning process will be very different between two organizations? (Hint: It is not whether they are for-profit or nonprofit.)
8. What are at least six of the parts of the standard strategic planning framework and in what order do they occur in the framework?
9. What is the conventional model of strategic planning and when is it best used?
10. What is the issues-based model and when is it best used?
11. What is the organic model and when is it best used?
12. What is the real-time model and when is it best used?
13. What is the inspirational model and when is it best used?

Highly Customizing the Strategic Planning Process

1. What are at least three different reasons for doing strategic planning, and why is it so important for your planners to know the most important reason for their planning?
2. What are at least three different definitions of success in strategic planning, and why is it so important for your planners to know their selected definition for their current planning?
3. How might you know if an organization is really ready for strategic planning?
4. What is the critical role of the Strategic Planning Committee and who should be on it?
5. What is the relationship between your role as facilitator and the role of the Committee?
6. What is the relationship between the role of the Committee and the role of the planners?
7. What are the standard tasks that strategic planning facilitators should do? What additional and optional tasks might they do? What determines which tasks that you should do and not do in the planning with your client?
8. What are at least three strategies to get all of the Board members involved in strategic planning?
9. What are at least three strategies to get strong buy-in from employees in the planning process and in the resulting Strategic Plan?
10. What are at least five key questions to answer when customizing the planning process to suit different cultures? How should those questions be answered?
11. What are at least three considerations when budgeting for the cost of hiring a facilitator?

Ensuring Strategic Thinking and Strategic Priorities

1. What are at least three criteria that any mission statement should meet in order to be most useful to the organization and its stakeholders? Why is it so important to specify those criteria to your planners?
2. What at least three criteria that any values statement should meet in order to be most useful to the organization and its stakeholders?
3. What at least three criteria that a values statement should meet in order to be most useful to the organization and its stakeholders?
4. How can you ensure that your planners do not get lost in word-smithing the statements?
5. What are at least two features of an organization that have the most influence on how it uniquely develops its statements (as compared to other organizations)?
6. What are at least four types of external trends that planners should consider during their strategic discussions, and in what order should they be considered?
7. What are at least six of the types of information that planners should consider when looking inside their organization during their strategic discussions, and in what order should they be considered?
8. What are at least three models, or tools, that could be used to systematically analyze the results of looking around the outside and inside of the organization during strategic thinking?
9. What are at least three stages of development in any organization and what are some of the strategic priorities in each stage?
10. What is a core competence? Why is it so important for any organization to know its core competence?
11. Why is it so important for any organization to know what business it is in, whether for for-profit, nonprofit or government agency?
12. What are at least three criteria that determine whether a priority is indeed strategic enough to include in a Strategic Plan?

Making Assignments and Monitoring Implementation

1. What are the typical contents of action plans, as part of the strategic planning process?
2. How can you ensure that action plans are fully integrated, aligned and realistic?
3. What is a critical success factor and what is its role in strategic planning?
4. What are the key considerations when determining the time span of a Strategic Plan?
5. What is the difference between an Executive Summary and a Table of Contents?
6. What are the Authorization page and the Associated Documents page used for?
7. How can you ensure that your planners effectively communicate the most appropriate contents of the Strategic Plan to each of the most relevant groups of stakeholders?
8. What are at least three tools for organizations to use to ensure their strategic priorities are fully integrated throughout their organization?
9. What are at least three tools for organizations to carefully monitor the status of implementation of their Strategic Plan?
10. How can leaders systematically change their Strategic Plan and yet retain its relevance to their organization and its stakeholders?