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Building Blocks for
Business Leadership

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Strategic Planning Guide and Agenda

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How to Use this Download

- This guide is for a two day strategic planning session
- On page 8 of this document is the survey that all attendees (the leadership team) complete before attending the strategic planning offsite. Prior to the offsite, combine the surveys and identify trends noted by the leadership team
- Key inputs for this session are results from the best places to work surveys, the town hall feedback, customer interviews, books/articles read by the attendees, and customer profitability analysis
- The guide assumes there is a facilitator
- For the different parts of this two-day agenda, the person responsible is noted in parenthesis
- From the McKinsey 7s model to the strategic planning pyramid, this guide uses/references other downloads

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Day #1

Start (CEO kicks off)

Start session with a reminder of the rules of engagement (below), a high level outline of the agenda, and the goal for the two days.

Rules of Engagement

- Speak your mind
- Be critical of our business
- Stay on point
- Respect confidentiality
- Be on time
- Have fun!

Book or Article Insights (Everyone)

Prior to offsite, each leadership team member reads a book or an article. Everyone shares ideas or lessons learned that we could apply to our firm.

Planning Pyramid (Facilitator)

This is the non-changing part of our planning (e.g. our values, our brand slogan, target markets, etc.). A quick review to ensure we're on the same page.

SWOT Themes (Facilitator)

Prior to offsite, the leadership team completed surveys. These are aggregated the meeting, themes are posted on large sheets of paper on the wall.

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Also prior to the offsite, the Town Hall was held to get input and direction from the employees at large. This information will be used as well.

The result is the top 3-5 items in S, W, O, and T.

McKinsey 7 S's Alignment and Company Strategy (Facilitator)

McKinsey 7 S's alignment will be shared from past work. For the team, walk through the McKinsey 7's and identify:

1. Are there any key items missing?
2. For the ones listed, what are the top one or two that are completely out of alignment or non-existent today?

NOTE: The purpose of this exercise is to identify potential Top 3 goals may exist in aligning the 7 S's.

Customers and Offerings (CFO, Facilitator)

Brought to the offsite will be a list of our top customers and offerings. The goal is to identify who is easy to work with and who we make money working with.

Define Top 3 Goals and 3 Thrusts (Work in Teams, Facilitator)

Using the items above, define the Top 3 Goals and the 3 Thrusts. Thrusts are not specific goals. Rather, they are guiding principles or a projection of where the one-year goal will be in three years.

For now, don't set the actual measurement/level. If there's a natural measurement/level that falls out of discussion, it's O.K. to list. The goals can come out of:

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- Strengths or Opportunities to leverage (SWOT Themes)
- Weaknesses or Threats to mitigate (SWOT Themes)
- Opportunity Themes (Opportunity Themes)
- Profitable customer segments to exploit (Customers and Offerings)
- Profitable service offerings to leverage (Customers and Offerings)
- Areas to get in alignment (McKinsey 7 S's Alignment)

Brainstorm potential goals.

After discussion, everyone will be given five votes. These five votes can be applied to one goal or spread across several goals.

The outcome is to define the top three goals. The goals should be prioritized. The #1 goal should have alignment with the yearly theme.

Finally, set the targets. What does the goal look like:

1. 1 year out (this should be main target to focus time/attention)
2. 90 days out

Define Top Company-Wide Goal that Will Become Theme

Given the goals, what should be the company-wide goal? It should unify the company and focus on a goal or thrust that is shared (One Team, One Dream). If there are thoughts on the theme reward or name, they can be shared but the goal of the offsite is to identify the theme—not do the internal messaging/marketing-related activities.

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Day #2

Execution Plan, Client Lifecycle, Marketing Plan, Sales Goal (CMO, Sales VP's)

While they can be subject to change based on the planning session, start the day with sharing of the vision for building clients, bullet point marketing plan, and sales goals for upcoming year.

Create 90-Day Action Plans and the Top Rock for Each Goal (Teams, Facilitator)

For the top 3 goals:

1. Get a volunteer "Champion" or ultimate person responsible for goal completion. For the champion, the facilitator should ask for a volunteer. This champion will share goal updates at all company meetings.
2. Draft action steps for the next 90 days. The goal is to hit the (3-5) big rocks needed to set us into action on the goal over the next few months. Of these 3-5 big rocks, choose the biggest for the planning pyramid (the one that absolutely must be hit)
3. For each action step, list who is responsible by name. Like the Champion there should be a volunteer for each action.

At End of Offsite Meeting: Evaluate the Retreat (Group completes and give to Facilitator)

Before leaving, on ask participants to write down and hand to facilitator:

1. One thing we should start doing in strategic planning
2. One thing we should stop doing in strategic planning
3. One thing we should continue doing in strategic planning

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After Offsite: Communication to Organization at Large (CEO)

- Share with the whole organization at yearly kick off meeting
- At monthly company-wide meetings, have champions share updates on the top three goals along with updates from sales, marketing, and person overseeing philanthropic initiatives for the year

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Company Planning Survey

Completed by Each Member Attending the Strategic Planning Offsite

You are important in helping define our strategy and plan. Before our meeting, your thoughtful input is needed. This information will:

- Have the contributor's names noted by their feedback
(i.e. unlike Town Hall this is not anonymous)
- Be combined
- Be shared with the group before our planning session
- Used as a guide in planning

My interest is in the future because I am going to spend the rest of my life there.

—Charles Kettering

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Questions

Questions: Core

Answer the following questions with as much detail as possible

1. If You Were CEO for One Day...and could make only one decision, what would it be?
2. What Are This Year's Hits...our successes, our home runs, our goals achieved?
3. What Are This Year's Misses...our failures, our strike-outs, our unachieved goals?
4. How do you think we are different from our competitors in a way that matters to our customers... in other words, what is our brand?
5. What New Markets/Products/Services Should We Pursue...that are unfilled, un-done, or being done poorly by our competitors?
6. What Is Our Single-Most Important Issue...that is being buried, ignored, or not dealt with, and is uncomfortable to talk about?
7. What is the bottleneck/shortage/chokepoint in our industry—the thing that if we controlled, we dominate our industry? What do you think we can do to control it?
8. What can we do to utilize technology better in how we run our firm?

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(core questions continued)

9. What are the biggest hassles for your team? These are areas where you spent a minute or more doing something that shouldn't have had to be done, should have been done right the first time, is a complaint, suggestion, idea, concern, or recurring problem.

10. Who is our ideal customer?

11. Our primary product/service is?

12. Our target geography is?

13. Our profitable growth will come as a result of?

14. We will measure company success by?

15. The non-negotiable traits of our employees are?

16. We should start?

17. We should stop?

18. We should make sure to continue?

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Questions: Strengths

Answer the following questions around **how our company is STRONG**, better than competitors, or ways that you believe we are unique.

- a. We're better than others because of the following...
- b. We're unique because we attract people who...
- c. When I look at work that improves my skill set, it's work that...
- d. The biggest frustration for our clients is...

Questions: Weaknesses

Answer the following questions around **how our company is WEAK**, where you believe we have exposure, we're not as good at places you worked in the past.

- a. Going forward, the biggest concern I have about our company is...
- b. When it comes to my own growth, I need training in...
- c. Of all the consulting assignments or types of training programs we deliver, I think our weakest offering is...
- d. We need help with _____ but no one seems to know the answer or care to find the answer.

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Questions: Threats

Answer the following questions around **where you see THREATS**.

- a. When it comes to getting or keeping our customers, I think the biggest threat we face is...
- b. When it comes to getting and keeping employees, our biggest threat is...
- c. If we don't succeed, it will be because we didn't hire people who...
- d. We should start offering the following service to our clients...

Questions: Opportunities

Answer the following questions around **where you see OPPORTUNITIES**.

- a. A great way to let prospects know about our company is...
- b. A benefit we could offer our employees for little or no cost that would be a great impact to our business is...
- c. A trend that will have a positive impact our business is...
- d. If we grow the following capability, it will line-up with where the world is headed...

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