



STRATEGIC PLANNING PACKAGES

	Premier <i>5 planning days, mid-year update, travel, and more...</i>	Standard <i>2 planning days, mid-year update, travel and more...</i>	Streamlined <i>1 planning day, mid-year check-in, travel and more...</i>
Phase I. Situation Assessment	<p>We will:</p> <ul style="list-style-type: none"> □ Conduct a two-hour on-site management briefing to define critical issues □ Conduct a half-day on-site planning team meeting to develop the assessment plan □ Provide templates for your use in developing the briefing book □ Make Springboard Online! available to all members of the planning team 	<p>We will:</p> <ul style="list-style-type: none"> □ Hold a 90-minute briefing via teleconference to define critical issues □ Hold a 90-minute teleconference to develop the assessment plan □ Provide templates for your use in developing the strategy briefing book □ Make Springboard Online! available to 2 members of the planning team 	<p>We will:</p> <ul style="list-style-type: none"> □ Hold a 90-minute briefing via teleconference to define critical issues and identify assessment needs. □ Provide templates for your use in developing the strategy briefing book. □ Make Springboard Online! available to 1 member of the planning team

NEXT: Phase II



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Phase II. Strategy Workshop	<p>We will facilitate an initial two-day strategy session to:</p> <ul style="list-style-type: none"> □ Review the situation assessment to identify trends and potential strategies □ Develop positioning strategies □ Establish/review mission, vision and broad goals □ Define specific, measurable objectives for each goal □ Establish/review guiding principles <p><i>Prior to the second session, your team will determine the baseline, three-year targets and first year milestones for each objective.</i></p> <p>We will facilitate a second two-day strategy session (2-3 weeks later) to:</p> <ul style="list-style-type: none"> □ Confirm targets for each objective □ Identify critical success factors and barriers □ Develop and prioritize strategies □ Establish communication plan and monitoring plan □ Define next steps <p>We will document the plan details and plan summary</p>	<p>We will facilitate a two-day strategy session to:</p> <ul style="list-style-type: none"> □ Review the situation assessment to identify trends and potential strategies □ Establish/review mission, vision and broad goals □ Define specific, measurable objectives for each goal □ Identify critical success factors and barriers □ Develop and prioritize strategies □ Establish communication plan and monitoring plan □ Define next steps <p>We will document the plan details and plan summary</p> <p><i>(Positioning strategy, guiding principles and specific targets for objectives are not addressed in the standard two-day workshop)</i></p>	<p>We will facilitate a one-day strategy session to:</p> <ul style="list-style-type: none"> □ Review the situation assessment to identify trends and potential strategies □ Establish/review the mission statement and broad goals □ Define specific, measurable objectives for each goal □ Brainstorm strategies and identify preliminary priorities □ Establish monitoring plan □ Define next steps <p>We will document the plan details and plan summary</p> <p><i>(Vision statement, positioning strategy, guiding principles, strategy prioritization, communications plan and specific targets for objectives are not addressed in the streamlined one-day workshop)</i></p>

NEXT: PHASE III



	Premier <i>5 planning days, mid-year update, travel, and more...</i>	Standard <i>2 planning days, mid-year update, travel and more...</i>	Streamlined <i>1 planning day, mid-year check-in, travel and more...</i>
Phase III. Implementation and Monitoring	<p>We will assist in:</p> <ul style="list-style-type: none"> □ A two-hour onsite staff briefing to review the strategic plan □ A one-day onsite action planning meeting to develop action plans for each priority strategy □ A strategy dashboard (Microsoft Excel-based) to track plan progress monthly □ A one-hour feedback session via teleconference to review strengths/areas for improvement in the process □ A half-day onsite update after six months to review plan progress <p>You will:</p> <ul style="list-style-type: none"> □ Implement the plan and the communications plan □ Monitor progress monthly using the dashboard □ Hold a formal review every six months and reassess the plan as needed 	<p>We will assist in:</p> <ul style="list-style-type: none"> □ A strategy dashboard (Microsoft Excel-based) to track plan progress monthly. □ A one-hour feedback session via teleconference to review strengths/areas for improvement in the process □ A half-day onsite update after six months to review plan progress <p>You will:</p> <ul style="list-style-type: none"> □ Confirm the overall positioning and guiding principles □ Determine the baseline, three-year targets and first year milestones for each objective □ Hold a briefing session for your staff to review the strategic plan □ Develop action plans for each priority strategy □ Implement the plan and communications plan □ Monitor progress monthly using the dashboard □ Hold a formal review every six months and reassess the plan as needed 	<p>We will assist in:</p> <ul style="list-style-type: none"> □ A strategy dashboard (Microsoft Excel-based) to track plan progress monthly. □ A one-hour feedback session via teleconference to review strengths/areas for improvement in the process □ A two-hour teleconference after six months to review plan progress <p>You will:</p> <ul style="list-style-type: none"> □ Confirm/develop the vision statement, positioning, and guiding principles □ Determine the baseline, three-year targets and first year milestones for each objective □ Finalize strategies and priorities □ Hold a briefing session for your staff to review the strategic plan □ Develop action plans for each priority strategy □ Implement the plan and communications plan □ Monitor progress monthly using the dashboard □ Hold a formal review every six months and reassess the plan as needed
<p>Add <u>Situation Assessment Services</u> to Any Package!</p> <p>Includes employee survey, customer/stakeholder survey, industry trends, analysis of current performance, and a briefing book for every member of the planning team.</p>			

Call 800.824.2850 to learn more!