# Strategic Planning Packages

<table>
<thead>
<tr>
<th></th>
<th>Premier</th>
<th>Standard</th>
<th>Streamlined</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5 planning days, mid-year update, travel, and more…</td>
<td>2 planning days, mid-year update, travel and more…</td>
<td>1 planning day, mid-year check-in, travel and more…</td>
</tr>
</tbody>
</table>

## Phase I: Situation Assessment

### We will:
- 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

### We will:
- 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

### We will:
- 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
### Premier
5 planning days, mid-year update, travel, and more…

We will facilitate an initial two-day strategy session to:
- 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

*Prior to the second session, your team will determine the baseline, three-year targets and first year milestones for each objective.*

We will facilitate a second two-day strategy session (2-3 weeks later) to:
- Confirm targets for each objective
- Identify critical success factors and barriers
- Develop and prioritize strategies
- Establish communication plan and monitoring plan
- Define next steps

**We will document** the plan details and plan summary

### Standard
2 planning days, mid-year update, travel and more…

We will facilitate a two-day strategy session to:
- 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

### Streamlined
1 planning day, mid-year check-in, travel and more…

We will facilitate a one-day strategy session to:
- 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

**We will document** the plan details and plan summary

*(Positioning strategy, guiding principles and specific targets for objectives are not addressed in the standard two-day workshop)*

*(Vision statement, positioning strategy, guiding principles, strategy prioritization, communications plan and specific targets for objectives are not addressed in the streamlined one-day workshop)*

---

**NEXT: PHASE III**
<table>
<thead>
<tr>
<th>Phase III. Implementation and Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Premier</strong> 5 planning days, mid-year update, travel, and more…</td>
</tr>
<tr>
<td><strong>Standard</strong> 2 planning days, mid-year update, travel and more…</td>
</tr>
<tr>
<td><strong>Streamlined</strong> 1 planning day, mid-year check-in, travel and more…</td>
</tr>
</tbody>
</table>

**We will assist in:**
- 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

**You will:**
- 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

---

**Add Situation Assessment Services to Any Package!**
Includes employee survey, customer/stakeholder survey, industry trends, analysis of current performance, and a briefing book for every member of the planning team.

Call 800.824.2850 to learn more!