

## **Follow a Strategic Planning Framework**

Unfortunately, not all methods offered or defined by firms who offer strategic planning services are created equal.

The ones that deliver more than just a list of disconnected projects stick to a successful design. They regularly produce the kinds of insights in a strategic planning workshop or offsite that are game-changing, and pre-emptive.

Here is a summary of the kind of retreat you can conduct, and don't forget to download a strategic planning framework pdf linked at the end for later use.

### **Step 1 - Prepare for the Retreat**

The most important data gathering takes place at this point in time. The point here is to allow the retreat to flow smoothly because it has all the data needed. For example, conduct a SWOT survey beforehand so that you don't spend valuable time in the actual event gathering opinion data.

Furthermore, before the event begins, you have engaged all relevant stakeholders in gathering this information so they feel as if they are making a contribution.

### **Step 2 - Start the Retreat with a Snapshot**

Devote the first session of your retreat to creating a summary of the past and current situation. This will bring all your participants onto the same page, available to think from the same place at the same time.

Plus, it's a team-building activity in its own right.

### **Step 3 - Pick a Target Year**

Take the team through an exercise to pick a planning horizon. This will determine how far your short/mid/long term plan will extend. It also limits your thinking to a certain time frame.

Emphasize that there are pros and cons in both directions and you want the team to pick a range which has just the right degree of challenge to produce a breakthrough strategic plan.

### **Step 4 - Develop Multiple Scenarios**

For the chosen target year, develop multiple scenarios which may occur in that year. Look to craft ones which are different from each other, combining similar ideas wherever possible.

### **Step 5 - Choose a Single Scenario, and Detail It**

Either select a preferred scenario from those which were proposed, or combine one or more to craft an ideal scenario.

Once it's selected, convert the scenario into a list of target metrics and projects required to reach them. This version of the Final Scenario is the one you'll use for the next phase of the strategic planning workshop.

### **Step 6 - Backcast to Create a Merlin Chart**

The from this step chart looks like a series of milestones and projects which are timed to hit certain targets by the chosen Target Year. It's a narrative of sorts, which assumes a number of parallel activities.

This activity is the most difficult one in the strategic planning workshop and requires a small cross-functional team with collective knowledge of how the business works from different angles.

### **Step 7- Create a Short-Term Strategy Map**

The map in this step is designed to communicate the short-term plan to a wider audience. It also defines which new projects must begin within the next three to five years.

Stakeholders welcome the map as it shows them some of the underlying strategic hypothesis, and gives them an idea of what's been accomplished in the strategic planning workshop.

### **Step 8 - Assign Projects**

From the strategy map, assign short-term projects to individual sponsors.

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Over time, I have found ways to compress these steps into 2 intense days rather than 3 more leisurely days.

For more details about the overall process, and the steps listed above, visit my newsletter website - <https://longtermstrategy.info>

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		<b>Day 1</b>		<b>Day 2</b>	
		<b>Activity</b>	<b>Output</b>	<b>Activity</b>	<b>Output</b>
<b>Morning</b>		Create a single, shared view of the organization	5-View Snapshot	Discuss and Agree on Merlin Chart	Merlin Chart Final
	<b>Afternoon</b>	Choose a Target Year / Horizon	Target Year	Create Short-Term Strategy and Diagram	Strategy Map
Generate Multiple Scenarios		Single Scenario			
Align on a Single Scenario		Detailed Scenario	Define Projects and Assign Sponsors	Project Definitions	
	Detail the Chosen Scenario				
<b>Evening</b>		Backcast from the Detailed Scenario and Integrate Initiatives	Merlin Chart Draft		

**FRAMEWORK**  
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