How to Conduct an Effective Strategic Planning Meeting

By Christine Luttrell, Client Account Manager, CS3 Technology
How to Conduct an Effective Strategic Planning Meeting

August 28, 2014

As part of the leadership team, serving in a District Director role, for the Texas Chapters of SHRM (Society of Human Resource Management), I am fortunate enough to get the opportunity to visit some great cities, network with other chapter and state leaders, and learn some really cool things.

The July strategic planning meeting for Texas SHRM was held recently in San Antonio. We had great weather and a great time. But most importantly, I learned a fabulous way to conduct a strategic planning session for ANY organization. How many of you have been involved in one of these where hours are spent discussing, arguing and really not getting anywhere? I suggest you give this a try. Here’s how it works:

Part One

1. Start with four pieces of chart paper on the wall, each separate piece of chart paper has one header/title: 1) Strengths, 2) Weaknesses, 3) Opportunities, 4) Threats.
2. Each individual is given a stack of small post it notes to capture S(trengths), W(weaknesses), O(pportunities), and T(reats) when asked to do so by the facilitator. They will also have a page of 6 stick on “dots” (not white) to be used
later. A packet with instructions and worksheets will also be given to each participant – see Attachment A.

3. The facilitator asks each participant to jot down 3-4 strengths, one per post-it-note, in 3 MINUTES and take them up front and stick them on the STRENGTHS board.

4. After all are up there, 2 volunteers are chosen to categorize the individual notes into relevant groups. Once you see what individuals have written, it will become pretty clear that most will fall within several categories (i.e. Reputation, Level of talent, leadership, Product, etc.). Look for emerging patterns. There is really no limit on the number of categories, but it usually is around 5-7 when all is said and done. The volunteers should take another sticky note and come up with the category name for each group of thoughts and stick it right on top of the individual items that are grouped together.

5. While the Strengths are being categorized, the facilitator asks the participants to write down 3-4 weaknesses in 3 MINUTES and take them up to the WEAKNESSES board. Again 2 volunteers are chosen to sort and categorize these into relevant groupings.

6. Same process happens for Opportunities and Threats.

7. When all are categorized with relevant headings, the volunteers that did the grouping for each section will report out to the group what the overall categories are for their section. For example, Reputation could be a STRENGTH category that might contain individual thoughts such as “well known in the state” or “honest”. See how this works? Participants can ask for clarification if they need a little more detail.
8. Once everyone is good with the categories on the SWOT charts, each person will use their dots to “vote” on which category or categories from the STRENGTH page they feel are most important to uphold the Vision and Mission of the organization. All 6 dots must be used and can be used on any of the strengths they wish (i.e. you could put one dot on six different ones, all 6 on one, 2 on one and 4 on another, etc.).

9. After the vote is complete, it is usually VERY easy to see which strengths are most important. The result is a prioritized list – those ideas with the highest number of colored dots are assigned the highest priority; and, these become your strategic priorities that will be developed into your strategic goals.

Note: This is a powerful step and confirms the group’s consensus. Participants are less likely to challenge the results if they have bought in to the process and were actively engaged in generating the outcomes.

Part Two

1. The entire group is then broken up into teams based on the most voted on categories on the STRENGTH chart. You can do all of them or just a subset of the most important ones. Totally up to you.

2. The facilitator can assign a category to a team or each team can pick the one that they want to work on. Only one team per category.

3. Allowing about 1 ½ hours, each team is responsible for taking one of the categories on the STRENGTH chart and coming up with a GOAL, including Action items outlining what it is, whose responsible, timing/due date and benefit of each, that pertains to the strength AND would alleviate a WEAKNESS all the while taking into consideration the OPPORTUNITIES and THREATS that were identified. Keep in mind that Action items should be measurable in some way. Let’s use Reputation again as an example. That is a definite strength, so the team should think about how you could use that strength to build a Goal for the next 3-5 years. The goal could be Increase Brand awareness across the US. Looking at the Weaknesses category, let’s say one was identified titled “National presence” with sticky notes behind it like “only do business in the Southwest region”. Building a set of action items around marketing to other regions, teaching or developing a specific product would help build that National presence while leveraging your stellar reputation. Make sense?

4. Capture the information on a worksheet so each team can report out at the end of the exercise.

5. Once this piece is complete, all notes should be consolidated by Goal. If time permits, this list of goals and actions can be tweaked and realistically reviewed to see what can be accomplished in a reasonable amount of time taking in to account any resource constraints. Otherwise, the same team or a smaller team
can be formed to complete this step at a later time. Keep in mind, the goals have already been prioritized based on the consensus of the entire team, so this step should be fairly easy.

6. Congratulations…you just built a Strategic plan for the next 3-5 years
**Attachment A**

**SWOT ANALYSIS**

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
</tr>
</thead>
</table>

**GAP ANALYSIS**

Based on our SWOT analysis results compared to the vision we seek to achieve, identify the gaps we need to overcome to achieve our vision. For example, a “weakness” identified in the SWOT analysis of “high customer turnover” may indicate a gap in inventory management, customer relations, and/or product to market strategy.
PRIMARY GOALS

Given the issues summarized in our previous analyses, what critical goals should we focus on to overcome gaps, build growth, and provide needed services to our members?

Try to limit your primary goals to a maximum of 5. Remember that these are initiatives for the company as a whole, not individual goals.

DETERMINING PRIMARY OBJECTIVES

- What are the primary objectives for this year?

- What are the primary objectives for the next 3-5 years?

- Sources of income for this year (and...can you think of any new ones?)

BARRIERS TO OUR SUCCESS

What are the perceived barriers to our success in the next year? What might keep us from reaching our goals?
ACTION PLAN WORKSHEET

Use this to create an action plan for each of your goals and to reduce or eliminate identified barriers. See action plan schedule on next page.

Goal:

Barriers to overcome:

Action steps to achieve this goal:

Resources needed:

General summary of contingency plan (if applicable):
**ACTION PLAN IMPLEMENTATION SCHEDULE**

Use one of these for each goal. Aim for a maximum of 5 goals, with 5 action items for each goal.

**GOAL #_____:**

<table>
<thead>
<tr>
<th>Action Item (What?)</th>
<th>Responsibility (Who?)</th>
<th>Completion Date (When?)</th>
<th>Outcome (Benefits)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>