# AMA2009: Facilitating an Effective Strategic Planning Process Training

BILGINC
IT Academy
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Duration: **2 Day**

**Efficiently prepare and run strategic planning sessions that produce real results.**

Regardless of goals, there's one thing that can be said about every strategic planning process: The stakes are high. So you need to get equipped with a complete and agile toolbox of facilitation techniques and skills. How can you get the right people—and get them to actively contribute? How can you prevent assertive personalities from taking the session off-track? How can you make sure your goals are effectively defined and that you have all the right elements in place?

This course combines effective facilitation with strategic planning. It's carefully crafted into three segments covering early discussions and agreements, strategic planning facilitation and implementation. You'll leave with hands-on experience and a comprehensive strategic planning toolbox that effectively prepares you to launch into any strategic planning facilitation.

**Who Should Attend?**

Experienced executives, directors of OD, senior HR leaders, division leaders, strategic planners and others who must manage the strategic planning process for a department or organization, as well as those who would like to become an internal or independent strategic planning facilitator.

## What You Will Learn

- Establishing agreements, consistent definitions and success metrics
- Setting parameters for team selection and role assignments
- Understanding and choosing an appropriate strategic planning model, frame of reference, and related decisions • Agreeing on logistics, scheduling needs and considerations
- Knowing the key components of the strategic planning process
- Translating the strategic planning process into tactical action and communication plans
- Enabling innovative thinking in managers and leaders
- Using simulation to demonstrate your understanding of new practices and tools
- Delivering organizational results through an effectively facilitated strategic planning session
- Establishing next steps and moving toward the execution phase
- Conducting regular review sessions to check progress towards milestones
- Establishing processes to align the organization, communicate the plan, and get organizational buy-in

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## Training Outline

**Clarifying Your Role**

- Identify the Different Roles of a Facilitator
- Clarify Senior Leadership's Expectations of Your Role as Facilitator
- Define Your Role as Facilitator

**Planning for Strategic Planning**

- Ask the Right Questions to Establish Shared Meaning Around Terminology and Outcomes of a Strategy-Planning Session
- Apply a Process When Contracting with Leadership
- Identify Strategic-Planning Champions and Ensure the Right People Are Part of the Process

**Strategic Planning Approaches**

- Recognize Current and Common Strategic Planning Approaches
- Articulate Considerations When Choosing a Strategic Planning Approach
- Define Strategic Planning Outputs

**Tools and Models Used in Strategic Planning**

- Discuss the Importance of Macro- and Market Environmental Factors in Strategic Planning
- Describe the Purpose of Using Models and Tools in Strategic Planning
- Recognize Various Models Used in Strategic Planning for Analyzing and Synthesizing Information

**Logistics—Before, During, and After**

- Manage the Logistics Before, During, and After the Strategic Planning Session
- Identify Critical Data That Can Make or Break a Strategic Plan

**Facilitating the Session**

- Prepare for Your Strategic Planning Session and Create an Environment for Effective Dialogue
- Apply Critical Skills and Techniques of an Effective Facilitator
- Manage Disruptive Behaviors During a Strategic Planning Session
- Use Processes to Drive Key Outputs and Produce Results

**Your Role in Implementation**

- Assist in Crafting a Strategic Narrative
- Establish Your Role in Aligning the Organization, Translating the Strategy Plan into Meaningful Actions, Communicating the Plan, and Getting Organizational Buy-In