



# STRATEGIC PLANNING

## Strategic Thinking & Execution Planning Process

by Elevation Leaders

*The key to success in most endeavors requires the right preparation, execution and follow-through. In this free resource we share the key steps to prepare your team for a Quarterly or Annual Planning session along with suggested agendas for both.*

*We've also provided a sample completed One-Page Strategic Plan and blank OPSP for your use.*



**ELEVATION**  
— LEADERS —

# 6 KEY PREPARATION STEPS



## 1. SET DATES

Set the dates for the Quarterly and Annual Planning sessions well in advance.

The Annual Planning session is normally 2 to 3 days and the Quarterly sessions 1 to 2 days. Specific agendas are detailed below.



## 4. WATCH THESE BOOK SUMMARY VIDEOS

[Good to Great - Jim Collins](#)  
[Great by Choice - Jim Collins](#)

Or better yet, read the books.



## 2. SCAN SCALING UP

Have the Executive Team familiarize themselves with the principles of *Scaling Up* (Rockefeller Habits 2.0).

For those short on time, [here is a link](#) to a video summary of the book.



## 5. EMPLOYEE SURVEY

A few weeks prior to planning the offsite, conduct an employee survey. Employees' insights are helpful in determining Quarterly or Annual Priorities since they are closer to the customers and are immersed in the daily processes of the business.

We suggest three simple questions:

- a. What should (enter company name) **start** doing?
- b. What should (enter company name) **stop** doing?
- c. What should (enter company name) **keep** doing?



## 3. COMPLETE A SCALING UP ASSESSMENT

Have the Executive Team take 20 minutes to complete the Scaling Up Assessment to see which of the Four Decisions — People, Strategy, Execution, or Cash — needs the most attention in the upcoming planning session.

Email [coaching@elevationleaders.com](mailto:coaching@elevationleaders.com) with the names and email addresses of your ExecutiveTeam and we'll get it set up for you



## 6. GET SOMEONE TO FACILITATE

Find someone outside the company to facilitate your planning sessions. Ask a colleague from another organization or bring in an experienced Scaling Up coach like those we have at Elevation Leaders.

This allows everyone on the team, including the CEO, to actively participate rather than worry about facilitation. Trained facilitators will know how to discern core values, define a powerful purpose, discover a key strategy, and help the team uncover the underlying constraints in establishing priorities and setting key performance indicators (KPIs).

# ONE PAGE STRATEGIC PLAN [OPSP] PREPARATION

1

## FEEL FREE TO REPLACE THE HEADINGS

Call them Core Values, Core Purpose, Brand Promise, Rocks, etc. – or not! You have the freedom to come up with your own unique language within the organization.

The document is merely meant to serve as a guideline.

2

## USE BLANK DOCUMENTS

There's a tendency to provide team members with completed or semi-completed OPSPs during planning sessions (i.e., with Core Values, Purpose, etc. already filled in).

We highly suggest you pass out blank OPSPs at the beginning of the session and have everyone fill them in by hand. There's something about re-writing the Core Values, Purpose, BHAG, etc. each quarter that helps hardwire them into the brain and better connects each person to what is said and decided.

3

## PROJECT UP ON A SCREEN

To facilitate the process, project the OPSP on a large screen. Designate someone to fill it in electronically so it can be immediately emailed to all of the participants after the planning session.

Doing this also helps people stay focused and makes it easier for everyone who is filling in documents by hand simultaneously.

# AGENDA | DAY 1 | SAMPLE 2-DAY ANNUAL AGENDA

Quarterly vs. Annual (timing and agendas): The Annual Planning session is typically 2 to 3 days; the Quarterly Planning sessions are 1 to 2 days.

## 8:30 - 9:00

Opening Remarks by Facilitator & CEO, Good News Stories/OP, and Outcome Expectations (what will make this a successful meeting for everyone)

## 9:00 - 10:00

Review Scaling Up Assessment

## 10:00 - 11:00

Define CORE VALUES Survey

## 11:00 - 11:15

Break

## 11:15 - 12:15

Define WHY / PURPOSE

## 12:15 - 13:15

Define BHAG! (Big Hairy Audacious Goal)

## 13:15 - 14:00

Lunch

## 14:00 - 15:15

Strengths, Weaknesses & Trends (Define Core Competency)

## 15:15 - 15:30

Break

## 15:30 - 16:45

Define CORE SANDBOX

## 16:45 - 17:00

Final Word

## 18:00 - ?

Team Dinner

# AGENDA | DAY 2 | SAMPLE 2-DAY ANNUAL AGENDA

Quarterly vs. Annual (timing and agendas): The Annual Planning session is typically 2 to 3 days; the Quarterly Planning sessions are 1 to 2 days.

**8:30 - 9:00**

Check in & Day 1 Recap

**9:00 - 10:15**

Define BRAND PROMISE  
& GUARANTEE

**10:15 - 10:30**

Break

**10:30 - 11:45**

Build 3-Year Vision

**11:45 - 12:45**

Build 1-Year Plan

**12:45 - 13:30**

Lunch

**13:30 - 15:00**

90-Day Focus (Define  
company wide priorities)

**15:00 - 15:15**

Break

**15:15 - 16:15**

Function Accountability Chart  
(gaps at the leadership table)

**16:15 - 16:45**

Review Rockefeller Habits Checklist.  
Choose one or two areas for  
improvement in the coming Quarter.

**16:45 - 17:00**

Final Word

# AGENDA | DAY 1 | SAMPLE 1-DAY QUARTERLY AGENDA

Quarterly vs. Annual (timing and agendas): The Annual Planning session is typically 2 to 3 days; the Quarterly Planning sessions are 1 to 2 days.

## 8:30 - 9:00

Opening Remarks by Facilitator & CEO, Good News Stories/OP, and Outcome Expectations (what will make this a successful meeting for everyone)

## 9:00 - 10:00

Review Scaling Up Assessment or Stop | Start | Continue Survey

## 10:00 - 10:45

Review WHY, CORE VALUES & BHAG

## 10:45 - 11:00

Break

## 11:15 - 11:45

Preview Previous Quarter's Priorities/Rocks

## 11:45 - 12:30

Review Dashboard & YTD Numbers

## 12:30 - 13:15

Lunch

## 13:15 - 14:00

Review CORE SANDBOX & 1-Year Plan

## 14:00 - 15:30

Build New 90-Day Plan (Define company-wide priorities for coming quarter)

## 15:30 - 15:45

BREAK

## 15:45 - 16:45

Process Accountability Chart (processes to be reviewed in coming quarter)

## 16:45 - 17:00

Final Word

## 18:00 - ?

Team Dinner

# AGENDA DETAILS



## OPENING REMARKS BY CEO

Great meetings are structured like great movies according to Pat Lencioni in his book 'Death by Meeting'. At the heart of all movies is a "conflict, then resolution" structure. Rather than open with something like "I'm glad all of you can be here to participate in this planning session (yawn)," instead set the stage with an opening line like "We face stiff competition from XYZ, the marketplace for our services is heating back-up, and we're being hindered by our ... so these next two days are critical in figuring out how we address these challenges and maximize our opportunities..." Or opt for something like "we've been offered the greatest opportunity to gain market share in five years. It is for us to figure out how to make it happen..." or "This is the year we must make the kinds of profits we expect from a great company." Pick up your hints from the preparation work you've done — the employee survey, the customer feedback, top three issues lists, and the SWT/SWOT analysis.



## GOOD NEWS STORIES

Share a round of good news stories. Following the opening remarks, you want to set a positive tone, loosen everyone up, and help the team connect by taking 10 to 20 minutes to have everyone share good news, both personally and professionally, from the previous week and reflect on the previous year, or quarter. Keeping it current helps make it relevant and fresh. The professional good news allows the team to count its blessings and the personal good news brings up a laugh or two — a powerful way to de-stress, slow the brain down to the alpha state and help keep (even the most dreaded) issues in perspective. Also, use it as an early gauge if someone is particularly stressed or disturbed coming into the meeting.



## START FILLING IN ONE-PAGE STRATEGIC PLAN TOOLS

The rest of the planning session is using the Growth Tools to drive the right questions and discussions. Go back to *Scaling Up (Rockefeller Habits 2.0)* Strategy section for specific instructions in completing the OPSP. Be sure to also review the other one page tools according to the suggested agenda overview above.



# Strategy: One-Page Strategic Plan (OPSP)

OSHBOJ[BUJPO Testco  
/BNF:

## People (Reputation Drivers)

### Employees

1. Appreciation every 7 days KPI = 100% at
2. Employee Net Promoter Score KPI = 60+
3. Voluntary A-Player Retention - KPI = 95%

### Customers

1. Delivery - KPI = Daily report 10 minutes
2. Client 'contact'- KPI = 3 Contacts per Client
3. NPS - KPI = Net Promoter Score at 8.5

### Shareholders

1. Cash increase daily - KPI = % of increase
2. Revenue Increase - KPI = 20%
3. Gross Margin - KPI = 55%

COREVALUES/BELIEFS (4IPVME/4IPVMEO'U)	PURPOSE (8IZ)	TARGETS (3–5 YRS.) (8IFS'F)	GOALS (1 YR.) (8IBU)																														
We live to hear the word "speed"  We never say no!  We always give options  We cultivate trust with clients	EASY! - We make using data easy so that it helps rather than hurts people!	<table><tr><td>FVUVSF %BUF</td><td>31 Dec 2023</td></tr><tr><td>3FWFOVFT</td><td>\$14,250,000</td></tr><tr><td>1SPfiU</td><td>\$2,850,000</td></tr><tr><td>MLU \$BQ/ \$BTI</td><td>\$1,425,000</td></tr></table> <p><b>Sandbox</b> \$500M+ Corporations - US, Canada, Europe</p>	FVUVSF %BUF	31 Dec 2023	3FWFOVFT	\$14,250,000	1SPfiU	\$2,850,000	MLU \$BQ/ \$BTI	\$1,425,000	<table><tr><td>:3 &amp;OEJOH</td><td>31 Dec 2020</td></tr><tr><td>3FWFOVFT</td><td>\$6,875,000</td></tr><tr><td>1SPfiU</td><td>\$1,375,000</td></tr><tr><td>MK5 \$BQ</td><td></td></tr><tr><td>(SPTT MBSHJO</td><td>\$3,781,250</td></tr><tr><td>Cash</td><td>\$687,500</td></tr><tr><td>A/3 %BZT</td><td>32</td></tr><tr><td>*OW. %BZT</td><td>15</td></tr><tr><td>3FW./ &amp;NQ.</td><td>\$225,000</td></tr></table>	:3 &OEJOH	31 Dec 2020	3FWFOVFT	\$6,875,000	1SPfiU	\$1,375,000	MK5 \$BQ		(SPTT MBSHJO	\$3,781,250	Cash	\$687,500	A/3 %BZT	32	*OW. %BZT	15	3FW./ &NQ.	\$225,000				
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1. Deep analytic capabilities
2. Culture inductive to PhDs
3. Live for Speed

8FBLOFTTFT:

1. Arrogance -- we're good and we know it
2. Sales Capabilities -- lacking, so better be the best
3.

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## Process (Productivity Drivers)

### Make/Buy

1. Pipeline Full - KPI = 60 qualified leads
2. Active Proposals - KPI = 14 active
3. Close Ratio - KPI = 75%+

### Sell

1. Time on Project - KPI = 90% of Budget max
2. Help Tickets - KPI = 95% SLA's met
3. Utilization Rate - KPI = 85%

### Recordkeeping

1. Invoice within 24 hours
2. Cash Conversion Cycle minus 18 days
3. Timely reports -- daily, weekly

### ACTIONS (QTR)

(JPX)

2020 #1	ending 31 March 2020
3FWFOVFT	\$2,185,000
1SPFIU	\$37,000
MLU \$BQ	
(SPTT MBSHJO	\$1,201,750
Cash	\$145,000
A/3 %BZT	35
*0W. %BZT	18
3FW./&NQ	\$225,000

### THEME

(253/A//6AL)

%BDMJOT	3/31/2020
MFBTVSBCMF 5BSHFU/\$SJUDBM #	
1,200 face to face meetings with decision makers, clients and partners	

### Theme Name

Race to 1,200

### YOUR ACCOUNTABILITY

(8IP/8IFO)

Your KPIs	Goal
1 Proposals Closed	50
2 Prospects Contacted	250
3 Face to Face Meetings	125

### Rocks

Who

1	Training Program - created - implemented - every team member	Lisa
2	Complete Business Plan	John
3	Increase Google Presence	Jane
4	Reduce A/R Time - to 60 days less than 10%	Tom
5	1,200 client meetings with whole team	Angel

### Scoreboard Design

Describe and/or sketch your design in this space

### Your Quarterly Priorities

Due

1	Hire 3 Sales Associates	3/31/2020
2	Increase Google Presence	3/31/2020
3	1200 Client Meetings with Whole Team	3/31/2020
4	Get 10 Stories from Clients on Core Values	3/31/2020
5		

### Critical #: People or B/S

22 Service Contracts

20 Service Contracts

Between green & red

18 Service Contracts

### Critical #: Process or P/L

89% Utilization Rate

85% Utilization Rate

Between green & red

75% Utilization Rate

### Celebration

A BIG dinner where we will bring our families - loved ones - together to celebrate the accomplishment

### Reward

\$12,000 donated to the groups top 12 favorite charities - \$1,000 per charity! \$10 for every contact made!

### Critical #: People or B/S

1500 Client Meetings

1200 Client Meetings

Between green & red

900 Client Meetings

### Critical #: Process or P/L

150 Referrals

100 Referrals

Between green & red

75 Referrals

5SFOET

1. Artificial intelligence and how it will evolve
2. The speed at which technology is evolving
3. Generational views on the use of our solutions

4. Communication mediums shifting -- social
5. Information flows (speed and type) changes
6. The value being placed of data as a tool

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# Strategy: One-Page Strategic Plan (OPSP)

Organization  
Name:

## People (Reputation Drivers)

Employees

Customers

Shareholders

- |          |          |          |
|----------|----------|----------|
| 1. _____ | 1. _____ | 1. _____ |
| 2. _____ | 2. _____ | 2. _____ |
| 3. _____ | 3. _____ | 3. _____ |

CORE VALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3-5 YRS.) (Where)	GOALS (1 YR.) (What)																														
		<table border="1"> <tr><td>Future Date</td><td></td></tr> <tr><td>Revenues</td><td></td></tr> <tr><td>Profit</td><td></td></tr> <tr><td>Mkt. Cap/Cash</td><td></td></tr> </table>	Future Date		Revenues		Profit		Mkt. Cap/Cash		<table border="1"> <tr><td>Yr Ending</td><td></td></tr> <tr><td>Revenues</td><td></td></tr> <tr><td>Profit</td><td></td></tr> <tr><td>Mkt. Cap</td><td></td></tr> <tr><td>Gross Margin</td><td></td></tr> <tr><td>Cash</td><td></td></tr> <tr><td>A/R Days</td><td></td></tr> <tr><td>Inv. Days</td><td></td></tr> <tr><td>Rev./Emp.</td><td></td></tr> </table>	Yr Ending		Revenues		Profit		Mkt. Cap		Gross Margin		Cash		A/R Days		Inv. Days		Rev./Emp.					
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Strengths/Core Competencies

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Weaknesses:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

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Your Name:

Date:

**Process** (Productivity Drivers)

*Make/Buy*

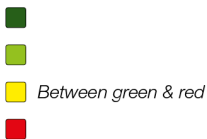
*Sell*

*Recordkeeping*

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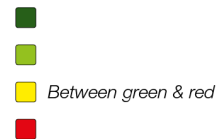
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**Critical #: People or B/S**

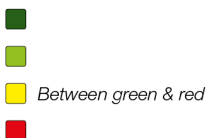


**Celebration**

**Critical #: People or B/S**



**Critical #: Process or P/L**



**Reward**

**Critical #: Process or P/L**



**Trends**

- |          |          |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

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