



Achieving radical and sustainable improvement in top line performance

Six Ways to Bomb Your Next Strategic Planning Conference



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Tis the season for holding the Annual Strategic Planning Conference to figure out the plan for next year and beyond. While expectations are high our experience has shown that most of these sessions are below threshold in terms of meeting everyone's expectations. With hundreds of successful facilitation's under our belt, we would like to pass along some practical lessons learned on how avoid a failed planning effort.

1. Ignoring the undercurrent - with a myriad number of issues floating around it is critical that each and every participant be interviewed to understand not only their

expectations for the session but also their personal view of the driving and restraining forces currently in play within the organization. By driving forces we mean, those things both internal and external that contribute to success. By restraining forces we mean, all things internal and external holding the organization back from achieving success. Knowing these hidden agenda issues is invaluable. Additionally, we also recommend one-on-one interviews with each member of the Board of Directors to ascertain their expectations from the planning team, including their definition of success. The last thing you want to do is invest in developing a plan that misses the mark with the Board, which is analogous to two ships passing in the night.

2. Too many cooks - while the tendency is to be inclusive and not leave people out so as not to hurt their feelings, we suggest that it is more important to have the "thought leaders" of the business at the planning table. By thought leaders we mean, those participants at the planning table whose knowledge, insight and opinion are critical to insuring "buy in" to the plan. A respected thought leader will carry more weight and help sell the plan versus someone who occupies a seat and does not contribute at the meeting. The ideal number of participants is 13 plus or minus 3.



3. Lack of process rigor - there should be a well defined structured thinking process that will lead the group in critical thinking without getting bogged down. "Winging it" is akin to flying a plane without radar or visual flight rules. Letting everyone know where you are as you move through the process is critical.

4. Fitting 10 lbs of potatoes into a 5 lb bag - there are always too many topics to discuss and not enough time to adequately address each of the issues. Separate the strategic decisions from the tactical ones and make sure you allocate a critical mass of time so as not to leave critical decisions open-ended. Targeting two days for a Strategic Planning Conference is the right amount of time plus or minus a half day.



5. Assuming everyone buys in - once you've gone through the process, do not assume that everyone agrees with the decisions and outcomes. The only way to know if there are any "yeah buts" is to go around the room and ask each one if they agree to the plan and will buy in to the commitments to make the plan happen.

6. Too much happy talk - ending the session with platitudes and generalities without specific tactical execution plans including completion dates and owners is "happy talk." There should be no question regarding who has to do what by when. We typically refer to this as a Radar Screen.



Avoiding the above pitfalls will go a long way toward achieving a success Strategic Planning Conference and lets not forget the facilitator. Hiring a competent and experienced facilitator allows the CEO and members of the Planning Team to participate without the burden of steering the group towards a preconceived solution. A competent facilitator needs to be a unbiased "friend of the court" to enable the Planning Team to seek the truth. The incremental cost is analogous to an insurance policy. Are you willing to take the risk of a failed conference? The risks and pitfalls can be significant.

If you have any questions or comments, please don't hesitate to reach out to us at kappainfo@kappaeast.com.

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