

Sample Strategic Planning Process

Step 1: Schedule Strategic Planning Meetings Annually

- Admin** set up recurring meetings on leader and team calendars each quarter (or at a minimum, semi-annually) to establish your meeting schedules, along with the meeting preparation tasks for all involved. Annual meeting to include a team activity.

Step 2: Prepare for and Conduct your Annual Strategic Planning Meeting

6 weeks prior:

- Admin** coordinates strategic planning location for full planning sessions out of the office with half-day team activity

3 weeks prior:

- Admin** begins drafting *Strategic Retreat Annual Agenda* and sends email to team regarding the items to complete in preparation for the meeting, which includes the following, due 1 week before the meeting:
 - **Partners / Business Leaders:** Complete *Strategic Planning Retreat : Partner Prep Questionnaire*
 - **Everyone Else:** Complete *Strategic Planning Retreat: Team Prep Questionnaire*

1 week prior:

- Name** follows up to ensure all team member preparation is complete. |

Day of:

- Hold Strategic Planning Meeting
- Annual goals and keystone priorities are captured and assigned to team members
- Name** takes notes and captures all agreed upon action items

Step 3: Document Strategic Plan & Keystone Priorities

- Within 48 hours, **Name** inputs and assigns all action into tracking system
- Within 1 week, **Name** completes the *Strategic Planning – Team Presentation Template PowerPoint* and shares/sends final version with team in regular team meeting
- Document annual goals and keystone priorities using the assigned due dates and owners
- Upcoming quarter's keystone priorities are determined, assigned owners
- Team and individual goals are set to support and align with the annual goals and keystone priorities

Step 4: Quarterly & Weekly Team Meetings

- Schedule and hold quarterly team meetings to review annual goals and set upcoming quarter keystone priorities using *Keystone Priorities Worksheet*.
- Hold team meetings to check in using *Weekly Team Meeting Agenda*.

