

The Facilitator's Guide to STRATEGIC PLANNING WITH REMOTE TEAMS

This process walks remote teams through creation of the core elements of a strategic plan: vision, mission, values, goals and strategies, resulting in what we call **The Essential Strategic Plan**.

You'll lead up to five meetings. **Each meeting follows the same basic process.**

If you are creating a strategic plan where none previously existed, use the complete package of five meeting agendas.

If you already have some of these strategic elements in place, choose the agendas that fill the gaps in your strategic plan.

Each agenda works as a stand-alone meeting.

Best For



Self-guided strategic planning

6 or fewer people

Working with remote participants

New and growing organizations

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ELEMENTS OF THE ESSENTIAL STRATEGIC PLAN

The 'essentials' covered in this series of meetings make up the core of your strategic direction.

The vision, mission and values define your organizational identity; your very brand. They become the filter through which you evaluate new opportunities, and can drive day-to-day decisions.

Goals and strategies define where you'll focus energy and resources.

The Essential Strategic Plan is concerned with what you want to achieve - your 'ends' - and with how you'll attain these ends, at a high-level.

By following this process, you will:

- 1 Gain clarity and focus;
- 2 Build team unity;
- 3 Generate excitement and motivation;
- 4 Create a foundation for better decision-making, near-term planning and measurement.

Terminology

There are many different models, processes and terminology used in strategic planning. The definition of terms can even be contradictory, in some cases. At its core, strategic planning is really about understanding what you want to achieve in the long-term, and how you'll get there.

These are the very simple definitions we use here to walk you through the process:

Vision: The future you intend to create.

Mission: Your core business.

Values: The principles and ethics for which you stand.

Goals: The handful of achievements towards which you will work over the next one to five years (you choose the timeframe).

Strategies: The broad courses of action you will take to achieve your goals.

Vision, mission and values are the most abstract, and ideally, the most enduring statements about what you want to achieve, and how you'll get there.

Goals and strategies help you to set mid-term milestones and plans for achieving your long-term aims.

PROCESS AND ROLES

Each agenda follows a pattern that will soon become familiar. This is the basic process for every meeting in the Essential Strategic Planning set:

1. **Discuss context and background**
2. **Brainstorm individually**
3. **Share individual ideas with the broader group**
4. **Pare down ideas to the priority concepts**
5. **Create a working draft**
6. **Agree on next steps**

The process is designed to help people contribute their best ideas. We **ask people to brainstorm individually** before group sharing because this **time for silent reflection and ideation helps generate maximum creativity**.

Note that each meeting results in *drafts* of the vision, mission, values, goals and strategies. We **do not use these meetings to wordsmith or arrive at a final version of any product**.

At the end of each agenda, during “Next Steps” the group assigns the work of fine-tuning to one or more participants. These owners are responsible for wordsmithing the vision, mission, values, goals or strategies (or working with a copywriter to do so). The owners are also responsible for reporting back to the team with the proposed final wording, getting feedback, making refinements, and publishing or documenting the final, as appropriate.

Roles

These agendas assume that **all meeting attendees participate equally**, but **there is a clear role for leadership**.

In each agenda, the Welcome and Closing Remarks are intended for the group leader. The leader should be fully aware of the end-to-end strategic planning process and should use the introductory and closing remarks to reiterate the process in each meeting.

In the welcome, the leader should cover:

- Why this meeting matters;
- How it fits into a broader planning process;
- What you’ll accomplish during this single meeting;
- And expectations of participants (i.e. full participation, open-mindedness, building on each other’s ideas, any ground rules).

In the closing remarks, the leader should cover:

- What was accomplished in the meeting;
- The next steps, including any offline work, and who is responsible;
- Where the team stands now in the broader process of strategic planning;

- And any feedback on how the team met expectations/areas for improvement.

Other roles might include a meeting planner and/or a facilitator.

The meeting planner's role may include:

- Communicating the agenda and prework;
- Setting up collaborative documents;
- Organizing the call logistics;
- Gathering any background materials/research/documentation to facilitate the discussion;
- Supporting the facilitator in managing the collaborative documents during the meeting;
- And taking notes.

The meeting facilitator does not replace the leader in the opening and closing remarks.

The facilitator's role may include:

- Guiding the process;
- Prompting discussion/asking critical questions/getting clarification;
- Monitoring time;
- Reminding participants of expectations/ground rules;
- Adapting the agenda, where needed;
- Managing the collaborative documents;
- And freeing up the leader to focus on the strategic thinking.

FACILITATION TIPS

Throughout the meeting, your role as the facilitator is to make sure people are clear, on task, and engaged.

You can help people get clarity by communicating the strategic planning process several times, in several ways.

During the opening and closing remarks (whether given by the facilitator or another leader) help people understand where you are in the strategic planning process, and what's next.

Review terminology regularly (reminding people what we mean by vision, mission, values, goals, strategies) and reiterating the core questions several times in each meeting.

Get feedback to be sure everyone is on the same page.

Keep people on task by working through the agenda. Regularly, let people know where you are in the agenda, what you've accomplished, and what's next.

Keep people engaged by using some of the following facilitation techniques.

During brainstorming, your role is to **make sure there's time and space for all ideas** to emerge.

- **Don't be afraid of silence** on the line, while people reflect.
- Use prompts and open-ended questions to **encourage people to keep thinking and sharing**.
- **Hold off on 'critical' thinking** until after you've shared and reviewed all ideas generated in brainstorming. That is, don't evaluate, discard, or prioritize ideas too soon.

After brainstorming, when you are clustering ideas by theme, **your role is to help people see patterns**. Ask people questions like, “Do these two concepts fit together? Is this the same idea, or are these different?”

During prioritization of ideas, your role is to **help people evaluate and rank ideas**. State the criteria or create criteria together. E.g. when prioritizing your goals, the criteria might be ‘impact’ and ‘feasibility’. As a facilitator, you’d ask, “What do you think about the potential impact of this idea? What about the feasibility?”

Toward the end of the meeting, **when deciding on next steps**, your role is to **make sure there is an action plan for finalizing the product** (the vision, mission, values, goals or strategies). Don’t close the meeting without specifying who is responsible, what’s involved in the task, and when the product is due.

Allow people an opportunity to provide feedback on what worked, and what didn’t work, and factor feedback into your next session.



Lucid builds the feedback into the meeting process automatically, prompting users to rate the meeting and provide any tips for improvement.

ADAPTATIONS FOR IN-PERSON MEETINGS AND BIG GROUPS

These agendas have been designed for a fully virtual meeting. Each meeting should move fairly quickly to keep engagement high. There are no physical materials required; everything can be done on laptops, with access to cloud tools (see Logistics Notes).

You may adapt any of these agendas to an in-person meeting by **using sticky notes** for individual brainstorming and wall space for clustering themes.

Group Size

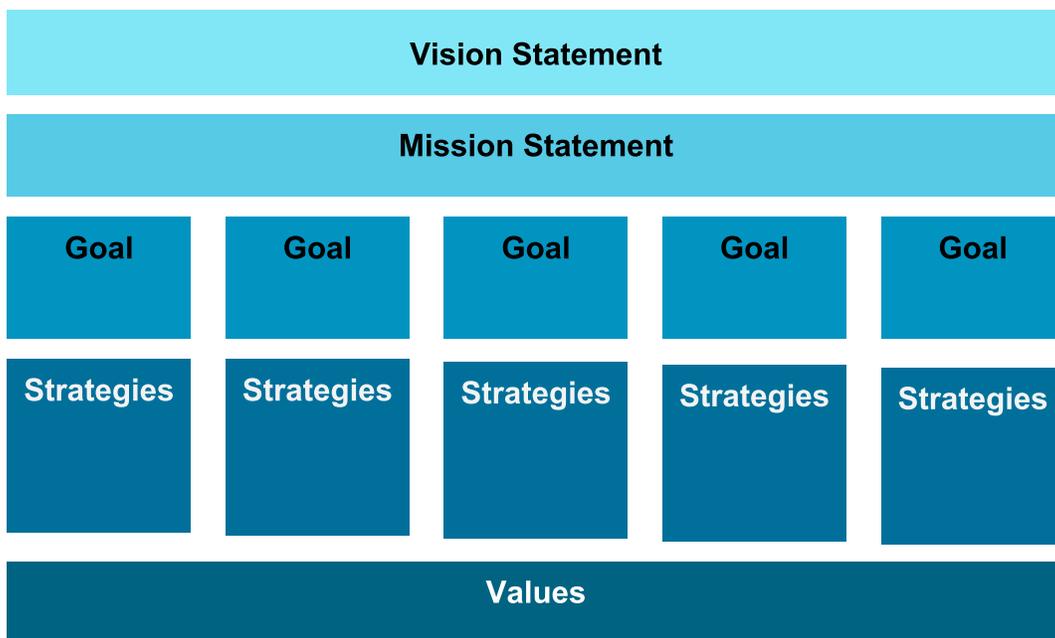
The ideal group size is six or fewer participants, but these agendas work for any group size.

Larger groups require **more time for discussion**, and it helps to create breakout groups (actual or virtual), when you have more people competing for airtime.

USING THE STRATEGY MAP

The Essential Strategy Map provides an **at-a-glance reminder** of where you're going and how you'll get there.

Use it as a communication tool with employees, partners, and depending on your competitive landscape, publish it openly.



Download this template to create your own map here:

https://docs.google.com/presentation/d/1_nX9xNI9GhFCEwq2fgthjvzDvZ_NatI-KnRu_tE9fFo/edit?usp=sharing

Next Steps in Strategic Planning

The Essential Strategic Plan creates a basic, but fully functional strategic plan. Depending on your organization, **you may wish to plan to a finer level of detail.**

For example, you might break down broad strategies into more discrete tactics. Tactics are actionable steps towards achieving your goals.

You can also break down goals into specific, measurable objectives. As you define measures, you can capture these in a scorecard to monitor your progress.

Using the Essential Strategic Plan to Guide Near-Term Planning

During the goal-setting meeting in the Essential Strategic Plan series, you will need to set the time horizon for your mid-term goals. Generally, organizations set strategic goals with a one to five year expiry date. If your strategic plan sets out a three or a five year plan, what should you do in the coming year? In the coming month?

Picture planning like a pyramid. At the top, you have your Essential Strategic Plan: it's distant, and it's lean. At each successive level below, your plans that become nearer-term and more detailed.

Right below your Essential Strategic Plan, you may have a one-year operational plan. Your operational plan sets out the steps you'll take in the coming year to achieve your strategic goals.

Below the operational plan, you may have program plans, project plans, and individual performance plans.

The Essential Strategic Plan keeps each layer of planning aligned, coherent, and fixed on the same long-term intentions.



THE STRATEGIC VISION MEETING

An organizational vision statement is **an image of the future you want to create**. The vision is important because it:

- Communicates your big aspirations and long-term goals;
- Rallies excitement;
- Focuses energy;
- Reinforces your brand;
- Conveys the reason your organization exists.

Over time, it is easy to lose sight of your founding purpose.

The organizational vision captures the excitement and energy you will need to overcome obstacles and make an impact.

RUNNING THE VISION-SETTING MEETING

Before the Meeting

In each meeting, you will collaborate on a shared document. Decide what collaboration tool you will use.

Make sure that all participants have full editorial/write access to the shared document you'll use.

Instructions for Participants

Let participants know that they will be writing during the meeting; each participant will be expected to capture their individual ideas before copying and pasting to the shared document. Advise them to set up their own personal brainstorming page using Word, Evernote or the tool of their choice.

To keep the meeting snappy, each individual should:

- **Research the definition and purpose of a vision statement;**
- Perform a quick Google **search for vision statements**, both good and bad. The point is to sample existing visions, to get a sense of what works and what doesn't work;
- **Be prepared to share and critique one or more example** in the meeting.

During the Meeting

The agenda uses the general planning process described above to focus specifically on creating your vision statement.

The Agenda

- 1 **Welcome** (5 minutes)
- 2 **Understanding Vision Statements**
(20 minutes)
- 3 **Individual Brainstorming** (5 minutes)
- 4 **Review Vision Themes** (15 minutes)
- 5 **Prioritize Concepts** (10 minutes)
- 6 **Draft Options** (15 minutes)
- 7 **Closing and Next Steps**



Tips for Brainstorming Vision Concepts

Getting into the visionary headspace doesn't always come naturally. You may need to **use prompts to elicit long-term, aspirational thinking**. For example, before brainstorming, ask people to imagine one or more of the following scenarios. Ten years from now...

- Your organization is up for a major award. What will be said about your achievements in the award ceremony?
- You get press coverage for your cumulative achievements. Write the headline.
- You publish a book on your organization's impact. Write the title and subtitle.

Let the ideas flow and encourage people to build on others' ideas. It is not until agenda item 5.0 that you switch to a critical/evaluative mode, and start to prioritize the most important ideas that must be captured in your vision.



After the meeting

Send out the follow-up email, which makes sure everyone gets their action items and a full report in their email, even if they couldn't attend the meeting.

During the meeting you will assign responsibility for fine-tuning the vision statement offline. Make sure this **work is done within a reasonable timeframe and that the results are reported back quickly** to the rest of the team. Be transparent about the process. Let people know why the final vision statement looks the way it looks. What decisions were made, and why?



THE MISSION MEETING

A mission statement defines how you are working, today, to achieve your vision. It is an unequivocal statement about what you do, for who, how.

The mission is important because it:

- reinforces your organization's identity and brand;
- helps people inside and outside the organization understand what they can expect of you;
- sets a boundary around what you do, and therefore what you don't do, protecting your organization from scope creep.

Crafting a mission statement usually comes after the vision statement, in strategic planning. Practically speaking, you may have created an organization based on a firm idea of your mission (again, what you want to do, for who and how) and a vague idea of your vision (why). Still, to create a strategic plan that inspires, we recommend you begin the process with the vision.

RUNNING THE MISSION-SETTING MEETING

Before the Meeting

In each meeting, you will collaborate on a shared document. Decide what collaboration tool you will use.

Make sure that all participants have full editorial/write access to the shared document you'll use.

Instructions for Participants

Most people have a general awareness of organizational mission statements. Still, they may not be as clear as they believe. Rather than spending time in the meeting teaching the concept, have participants do the prework. Specifically:

- **Look up the definition of a mission statement** and what it should achieve.
- **Look at mission statements of other organizations** to get a sense of what works/what doesn't work.
- Come prepared to share and critique **one or more example**.

During the Meeting

Refer to the Process, Roles and Facilitator Tips earlier in this guide for tips on opening, running and closing each meeting. You'll also find details on the process in the agenda.

The Agenda

- 1 **Welcome** (5 minutes)
- 2 **Understanding Mission Statements**
(20 minutes)
- 3 **Individual Brainstorming** (5 minutes)
- 4 **Review Mission Themes** (15 minutes)
- 5 **Prioritize Concepts** (10 minutes)
- 6 **Draft Options** (15 minutes)
- 7 **Closing and Next Steps**

Tips for Brainstorming Mission Concepts

These are the core questions your mission should answer.



What do we do?

What is our core business?

For who or where?

Who are we for?

How?

What about our methods sets us apart?

Let the ideas flow and encourage people to build on others' ideas. It is not until agenda item 5.0 that you switch to a critical/evaluative mode, and start to prioritize the most important ideas that must be captured in your mission statement.



After the meeting

Send out the follow-up email, which makes sure everyone gets their action items and a full report in their email, even if they couldn't attend the meeting.

During the meeting you will assign responsibility for fine-tuning the mission statement offline. Make sure this **work is done within a reasonable timeframe and that the results are reported back quickly** to the rest of the team. Be transparent about the process. Let people know why the final mission statement looks the way it looks. What decisions were made, and why?



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VALUES

Organizational values define what matters to your organization, and what principles you stand for, collectively.

Published organizational values are important because they:

- provide a framework for making difficult decisions;
- reinforce your brand;
- help you find and team up with like-minded partners;
- attract employees that will fit in your culture;
- attract customers/clients/users that will love what you offer.

RUNNING THE VALUES-SETTING MEETING

Before the Meeting

In each meeting, you will collaborate on a shared document. Decide what collaboration tool you will use.

Make sure that all participants have full editorial/write access to the shared document you'll use.

Instructions for Participants

Have participants do the prework:

- **Research organizations that are transparent about their values** (Note: not all will explicitly label their values as 'values', so look for implicit values in About Us pages and Blog posts).
- Look for organizations that talk consistently and appealingly about values.
- Optionally, look for organizations that post values **that seem out of synch with their reputation** or other messaging.
- **Come to the meeting prepared to share** and critique one example.

During the Meeting

Refer to the Roles and Facilitator Notes earlier in this guide for tips on opening, running and closing each meeting. You'll also find details on the process in the agenda.

The Agenda

- 1 **Welcome** (5 minutes)
- 2 **Understanding Values Statements**
(20 minutes)
- 3 **Individual Brainstorming** (5 minutes)
- 4 **Review Values Themes** (15 minutes)
- 5 **Prioritize Concepts** (10 minutes)
- 6 **Draft Options** (15 minutes)
- 7 **Closing and Next Steps**

Tips for Brainstorming Values

Stay in brainstorming mode until you've generated feedback on these questions:



What principles guide how we work with clients? With partners? With each other?

What do we stand for?

What is best about our culture?

Let the ideas flow and encourage people to build on others' ideas. It is not until agenda item 5.0 that you switch to a critical/evaluative mode, and start to prioritize the most important ideas that must be captured in your organizational values.



After the meeting

Send out the follow-up email, which makes sure everyone gets their action items and a full report in their email, even if they couldn't attend the meeting.

During the meeting you will assign responsibility for fine-tuning the values statement offline. Make sure this **work is done within a reasonable timeframe and that the results are reported back quickly** to the rest of the team. Be transparent about the process. Let people know why the final values statement looks the way it looks. What decisions were made, and why?



4

THE GOAL SETTING MEETING

This agenda frames goal-setting in the context of your vision, mission and values. If you have not yet established these, you will need to adjust the agenda.

The duration of this meeting is longer than the others in this series. During the vision, mission and even values meetings, your outcomes were one or two sentences, or a handful of words.

During the strategic goal-setting meeting, **you are working to agree on typically three to five goals**. It is a slightly different task, and the answers may not be found as intuitively. To land on strong strategic goals, you need to spend time looking at the landscape in which you operate. You may even need to pull some data.

A vision, mission and values may serve an organization for decades or more. **Strategic goals are shorter-lived**. Goals can serve an organization for a one year period, or more typically, up to five years.

Strategic goals are important because they:

- **Provide stepping stones** towards achieving your vision;
- **Bring focus** to everyday work;
- **Support effective decision making**, especially around how time and resources will be assigned.

RUNNING THE GOAL-SETTING MEETING

Before the Meeting

In each meeting, you will collaborate on a shared document. Decide what collaboration tool you will use.

Make sure that all participants have full editorial/write access to the shared document you'll use.

Instructions for Participants

Ask participants to do the prework. Specifically:

- **Look up the definition** of strategic goals;
- **Understand the role of goal setting** in strategic planning;
- Come **prepared to discuss what developments (internal and external) are most significant.** i.e. which developments impact our prospects of achieving our vision?
- Come **prepared to propose goals.**

During the Meeting

Refer to the Process and Roles earlier in this guide for tips on opening, running and closing each meeting. You'll also find details on the process in the agenda.

The Agenda

- 1 **Welcome** (5 minutes)
- 2 **Understanding Goal Setting**
(20 minutes)
- 3 **Review Vision, Mission, Values** (5 minutes)
- 4 **Context Setting/ Environmental Scan**
(20 minutes)
- 5 **Individual Brainstorming** (5 minutes)
- 6 **Review Goal Themes** (20 minutes)
- 7 **Prioritize Goal Concepts** (10 minutes)
- 8 **Draft Statements** (20 minutes)
- 9 **Check Drafts** (15 minutes)
- 10 **Closing and Next Steps** (10 minutes)

Tips for Goal Setting

Note that in this meeting, the first question on the agenda is in item 2.0, where you choose a time-frame for your goals. **Your team needs to decide whether you are setting goals for one year, five years, or somewhere in between.** If this is a question that leadership has already answered, reframe this agenda item; don't pose it as a question, but do let people know the time-frame you're working with.

Keep in mind that the purpose of the meeting is to answer these questions:



What achievements or strengths do we want to build on?

What weaknesses or risks do we need to address/remedy?

What new opportunities should we pursue?

You may find that people slip into discussing questions of 'what' needs to be done. The challenge will be to shift the thinking toward 'ends'. **Ask the question, "to what end?" repeatedly, and you will create better goals.**



After the meeting

During the meeting you will assign responsibility for fine-tuning the goals offline, and adding a measurable target for each goal, if desired. E.g. if your goal is to become more profitable, your target might specify the percent growth you desire.

Be transparent about the process. Let people know why the final goals were chosen. What decisions were made, and why?



THE STRATEGIES MEETING

For each goal that you have set, you will have a set of strategies. **Strategies define how you will achieve your goals;** they articulate your broad courses of action for goal attainment.

For example, if one of your goals is to generate more revenue, you may have three or more strategies for marketing, e.g. social media marketing, direct marketing, advertising.

Your strategy session, like your goal-setting session, may be one of your longer strategic planning sessions. **It takes some time to set unique strategies for each goal.**

RUNNING THE STRATEGIES MEETING

Before the Meeting

In each meeting, you will collaborate on a shared document. Decide what collaboration tool you will use.

Make sure that all participants have full editorial/write access to the shared document you'll use.

Instructions for Participants

Have participants complete the pre-work. Specifically:

- **Review the organization's draft or final goals.**
- **Research the difference between goals and strategies.** Be familiar with the relationship between the two.

Note that there can be some confusion around 'strategy' when researching online. Strategy is sometimes used to refer to the broader strategic plan, and sometimes used in the sense we use it here.

This is one of the clearest explanations available:

<http://www.forbes.com/sites/mikalbelicove/2013/09/27/understanding-goals-strategies-objectives-and-tactics-in-the-age-of-social/>

During the Meeting

Refer to the Roles and Facilitator Notes earlier in this guide for tips on opening, running and closing each meeting. You'll also find details on the process in the agenda.

The Agenda

- 1 **Welcome** (5 minutes)
- 2 **Understanding Strategies**
(10 minutes)
- 3 **Review Goals** (10 minutes)
- 4 **Individual Brainstorming** (15 minutes)
- 5 **Review Strategy Themes** (35 minutes)
- 6 **Evaluate & Select Strategies** (20 minutes)
- 7 **Check Draft Strategies** (15 minutes)
- 8 **Closing and Next Steps**

Tips for Brainstorming Strategies

Facilitate the brainstorming so that the group comes up with **answers to these questions for each separate goal:**



How can we achieve this goal?

What course of action would enable us to attain this goal?

Remind people to answer these questions for each separate goal, so that you come away with unique strategies for each goal.

To make things clear, **keep the goals posted somewhere for easy reference.** Create separate collaborative documents for each goal, or clearly separate sections.



After the meeting

Send out the follow-up email, which makes sure everyone gets their action items and a full report in their email, even if they couldn't attend the meeting.

During the meeting you will assign responsibility for fine-tuning the strategies offline. Make sure this work is done within a reasonable time-frame and that the results are reported back quickly to the rest of the team.

Be transparent about the process. Let people know why the final strategies were chosen. What decisions were made, and why?

STRATEGIC PLANNING RESOURCES



On the Web

How to Write a Vision Statement That Inspires (video)

<https://www.youtube.com/watch?v=ioY-YSOKBtY>

How to Write a Mission Statement (video)

<https://www.youtube.com/watch?v=XtyCt83JLNY>

Company Core Values: Why to Have Them and How to Define Them

<http://7geese.com/benefits-of-having-core-values-and-how-to-set-them-in-your-organization/>

Examples of Business Goals and Objectives

(Note: We don't cover objectives here, but it helps to understand goals in contrast to objectives)

<http://smallbusiness.chron.com/examples-business-goals-objectives-4698.html>

Goals, Objectives, Strategies and Tactics: What's the Difference (video and text summary)

<http://www.retaildietitians.com/newsletter/videos/goals-objectives-strategies-and-tactics-whats-the-difference/>



Books

Michael Wilkinson,

“The Executive Guide to Facilitating Strategy” 2011

<http://www.leadstrat.com/product/the-executive-guide-to-facilitating-strategy-autographed-copy/>

ABOUT THE AUTHOR

These templates were designed by Anna O’Byrne.

Anna is the founder of Upstream Meetings, a meeting design and facilitation consultancy.

You can find Anna blogging on virtual strategic planning and other topics at www.upstreammeetings.com/blog and tweeting on remote work [@meetyouupstream](https://twitter.com/meetyouupstream).

[Contact Anna](#) with questions on Essential Strategic Planning or to facilitate your next meeting.



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Additional Resources From Lucid Meetings

Download agendas in Word, find online brainstorming software recommendations, and read about our experience using these templates with the team at Lucid Meetings.

**Get the Complete Toolkit for
Strategic Planning with Remote Teams**

www.lucidmeetings.com/templates/complete-toolkit-strategic-planning-remote-teams