# Strategic Planning: Drafting Strategies Meeting

## Goal

Draft a set of strategies for reaching our goals.

Works best with 6 or fewer participants.

## Duration

120+ minutes

## Agenda

### 1.0 Welcome (5 minutes)

Purpose of meeting, expectations, outcomes.

### 2.0 Understanding Strategies (10 minutes)

Discuss: What are strategies and why do we need them? How are strategies different from goals? How do strategies fit into the process of strategic planning?

### 3.0 Re-cap Goals (10 minutes)

Quick review of draft/final goals. Discuss any questions the team may have re: these before we develop strategies for each goal.

### 4.0 Individual Brainstorming (15 minutes)

Moving from the first goal to the last goal, individually write down ideas for how you could achieve each goal. What broad courses of action are necessary?

Individuals write their ideas in a private document for the allotted time.

Note: As you brainstorm, keep separate the ideas associated with each separate goal.

### 5.0 Review Strategy Themes (35 minutes)

Working from the first goal to your final goal, individuals post/share their written ideas on a collaborative document under the appropriate goal heading. Review the ideas as you go, clarifying where necessary.

Then, working from the first goal to the final goal, create clusters of ideas under each goal by grouping like ideas. Write a header for each theme, loosely summarizing what the strategy ideas are all about. The header can be one word or a phrase.

### 6.0 Evaluate and Select Strategies (20 minutes)

Working from the first goal to the final goal, roughly rank the strategy themes from most important to least important. Which themes are high-impact (vis a vis our goals)? Which are highly-feasible?

### 7.0 Check Draft Strategies (15 minutes)

Review the high-priority themes that emerged under each goal. What strategies do you have? Do they look right? Is anything missing? What changes do you need to make, if any?

### 8.0 Review and Close (10 minutes)

Agree on the process for finalizing the strategies. I.e. one or two people should be responsible for writing and publishing the strategies.

Discuss next steps in finalizing and implementing strategic plan.

## Resources

### Overview

Read about this meeting in The Complete Toolkit for Strategic Planning with Remote Teams

<http://www.lucidmeetings.com/templates/complete-toolkit-strategic-planning-remote-teams>

### How-To Guide and Template

Online meeting template with full 35-page Facilitator’s Guide *(Lucid Meetings account required)*

<https://meet.lucidmeetings.com/meeting_template/3122>