

# The Leader's Guide to the STRATEGIC PLAN REFRESHER

All strategic plans become outdated quickly, but that doesn't necessarily mean you need to start over.

This relatively short meeting will help your team identify important changes in your circumstances and knowledge that you can use to refresh your strategy and keep it relevant.

## Best For



**Teams with an existing strategic plan.**

**Teams that don't have an established strategic review and planning cadence.**

**As a precursor to additional planning work.**

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# INTRODUCTION

## **Why does a review and possible updating of your five-year plan or even one-year plan make sense?**

Strategic plans, yearly goals, and project outcomes are either informing and empowering your work or they are not.

The question is simple and elegant:

Is our focus for the next three weeks still being shaped by our longer term ambitions?

The intention here is not to rewrite anything.

The intention is to:

- a) identify what goals or approaches need changing and
- b) identify actions that need to be taken.

The outcome is likely to be a single page of next steps that might include: designating a subgroup to look into something, finding resources to apply, agreeing to increase the group's focus on an area of the plan, deciding not to do something currently in the plan, to set aside time in future meetings for follow-up discussions, etc.

# THE AGENDA

## ABOUT

A thoughtful sequence of inquiry designed to clarify where your team is and where you want to go.

## PREP

Everyone should review the existing strategic plan before the meeting, and the questions posed in the agenda.

- 1 **Welcome and Overview** (10 min)
- 2 **Accomplishments** (30 min)
- 3 **Current Reality** (20 min)
- 4 **Expectations** (15 min)
- 5 **New Possibilities** (15 min)
- 6 **Might Now Be Possible** (15 min)
- 7 **Dreams** (10 min)
- 8 **Noise vs Passion** (15 min)
- 9 **What to Pursue** (20 min)
- 10 **Closing** (10 min)

# STEP-BY-STEP INSTRUCTIONS

## Before the Meeting

Review the agenda and adjust the questions to fit your group's working style and language.

If you stick to the timings listed here, the meeting will last about 3 hours. **These timings are suggestions only.**

You may wish to take more time if a conversation is adding value (creating good stuff). End each conversation when it's reached its peak and is losing steam; do not try to get every last idea or comment out.

### Send invitations at least 1 week in advance.



In the invitation, include:

- A copy or link to the most recent version of the strategic plan
- The reasoning behind the meeting
- The process that will be followed so that people can prepare

### Group Preparation

Ask everyone invited to reflect on each of the questions posed in the agenda and find 2 or 3 things to be shared for each. This will ensure that the conversations are rich and efficient.

# During the meeting

1

## Welcome and Overview (10 minutes)

Welcome everyone and thank them for participating. Then, discuss the intended outcomes for this meeting.

2

## Accomplishments (30 minutes)

Discuss as a group:

Maintaining a culture of accomplishment and fulfillment is one of the jobs of leadership. Why? Because no matter how much we do, there will be more to do. Management will keep raising the bar and as individuals we also know we work better when we are pushing the limits of our own capability. The following questions are designed to remind us of everything we have accomplished so that when we go forward, we do so knowing we are already really good.

Let's talk about our accomplishments and acknowledge the work of others.

- What should we be proud of?
- What results have we produced?
- What do our stakeholders say we have accomplished?
- What limits and problems have we uncovered that we were not aware of earlier?
- What new thinking do we have?
- What breakthroughs have we produced?
- What new approaches have we created?
- What have we learned?
- What new capabilities do we have as individuals; as an organization?
- What has changed for the better in how we talk about our work?

3

### **Current Reality (20 minutes)**

Discuss as a group:

- What were we facing and thinking about when we put together our existing plan?
- What are the current pieces of our reality?
- Has anything changed about that reality for which we need to adjust?

4

### **Expectations (15 minutes)**

Discuss as a group:

- What are we expected to produce that someone will be upset if we do not deliver this?

Strategic plans often do not reflect the set of expectations that others have for us that must also be delivered upon. It's worth spending some time to surface any areas that the group might feel we've let slip or are at risk because we haven't been focused on them.

5

### **New Possibilities (15 minutes)**

Discuss as a group:

- What do we now see that we can accomplish if we choose to take it on?

This is in addition to the original plan. No one is asking for this but we might decide to add this to our list of work.

6

### **Might Now Be Possible (15 minutes)**

Discuss:

- What do we think might be possible (can't guarantee, but we can see that perhaps it could)?
- As we get into the execution of this plan, what has become possible that we couldn't see earlier?

7

### **Dreams (10 minutes)**

Discuss as a group:

- On our best days, what dreams come to us?

This is an opportunity to share our best moments for forward thinking. These dreams are kept at bay by our current obstacles and long list of things to do. Still, it's useful to play with this conversation for ten minutes to keep as much possibility as we can in front of us.

8

### **Noise vs Passion (15 minutes)**

Discuss as a group:

- In the current reality and body of work, what is noise (requiring struggle and effort) and what is passion (things you just love to get into)?

Remember: noise for you might be fun for me. Perhaps that report writing or grant writing keeps getting pushed to back of your line. Knowing what areas we each struggle with can provide opportunities for help or even reassignment of tasks.

9

### **What to Pursue (20 minutes)**

Discuss as a group:

- Reflecting back on all of these conversations, what seems to make sense for us to pursue?
- In other words, now what? Given these conversations what should we do?

If you're not doing so already, now is the time to start writing things down. You may decide to update your plan, start a new initiative, or hold a follow-up meeting. Whatever you choose, make sure to be specific about the next step and assign an owner to make sure it actually happens.

10

### Closing (10 minutes)

Before the group disperses, it's important to bring closure to the meeting.

1. **Confirm Commitments**

Ensure each next step is clear, assigned to a committed owner, and has a reasonable due date.

2. **Ask:** Any final questions or comments?

3. **Express Appreciation:**

Acknowledging everyone's participation and expressing gratitude for special contributions.

## 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.



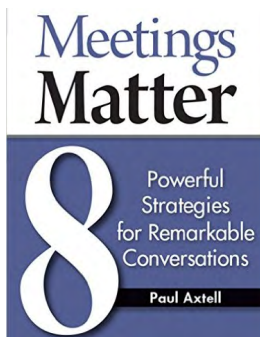
# RESOURCES FOR ACHIEVING MEETING MASTERY



## On the Web

Ask Paul: Paul Axtell's Blog

<http://paulaxtell.com/blog/>



## Books

Paul Axtell,  
“Meetings Matter: 8 Powerful Strategies for Remarkable Conversations” 2015

<http://paulaxtell.com/books/meetings-matter/>

## Related Templates

A Protocol for Clearing Questions and Responding to Complaints

<http://www.lucidmeetings.com/templates/paul-clearing-protocol>

Gathering Productive Feedback

<http://www.lucidmeetings.com/templates/rick-gathering-feedback>



## On the Lucid Meetings Blog

How to Refresh Your Strategic Plan in 4 Hours or Less

<http://blog.lucidmeetings.com/blog/how-to-refresh-your-strategic-plan-4-hours-or-less>

# ABOUT THE AUTHOR

**This template was designed by Paul Axtell.**

Paul Axtell provides consulting and personal effectiveness training to a wide variety of clients, from Fortune 500 companies and universities to nonprofit organizations and government agencies. A large focus of his work is how to run effective and productive meetings—to turn them from dreaded calendar items into vital, productive sessions with measurable results.



He is the author of the award-winning book *Meetings Matter: 8 Powerful Strategies for Remarkable Conversations, Being Remarkable, and Ten Powerful Things to Say to Your Kids: Creating the Relationship You Want with the Most Important People in Your Life*, which applies the concepts of his work to the special relationships between parents and children of all ages.

Learn more at [PaulAxtell.com](http://PaulAxtell.com)

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