

How To Run A Strategic Planning Meeting

Top tips on how to run a strategic planning meeting.

1. Invite the right people

A strategy meeting should bring together key members of your organisation's senior management team e.g. Marketing, Sales, Finance, HR.

Try to avoid the temptation to involve too many people. Five people is a good rule of thumb, but certainly invite no more than eight. If you think it is essential that others are involved, consider holding a review session with the next tier down before submitting your plan.

2. Hold it out of the office

It is advisable to hold your strategy planning session away from the office. This prevents participants being distracted from the task in hand, or getting called away to deal with departmental problems. The less distractions there are, the better the planning process will be.

You might want to consider arranging to meet the night before the session, for a relaxing dinner. This is particularly useful to help managers who don't meet very often to 'bond'.

A weekend planning meeting can also work well. This often gets round the problem of clashing diaries, and a casual dress code can help people to feel more relaxed. It also sets the planning exercise firmly apart from other day-to-day work.

3. Set the agenda

Successful planning meetings need a clear agenda from the start. A copy of the agenda should be sent along with any relevant paperwork to all participants in plenty of time for the meeting. That way, everyone knows what to expect from the meeting, and what issues really need to be covered.

4. (Everyone) be prepared

It is good to get participants thinking about their contribution to the planning session prior to the event. A useful way of doing this is to ask each of them to prepare a short positioning paper or briefing note to bring to the meeting. This makes for better discussion, as people are clear in their own minds about what the issues are.

5. Agree the timeframe

A strategic plan normally covers the next three to five years, with goals set throughout this period to benchmark progress. The plan itself should also be formally reviewed on an annual basis.

6. Consider hiring a facilitator

Some planning teams find that a facilitator can aid the planning process and deliver better or quicker results. There are several key benefits to using a facilitator, including:

- Keeping timing on track.
- Adding objectivity to discussions.
- Helping to summarise debate and reach consensus on key points.
- Helping to deal with personality issues.

The greatest advantage in using an outside facilitator is in ensuring that the planning process is run professionally and that there is a meaningful result at the end of it. You should expect to emerge from your session with a complete plan, bar a few minor details.

7. Build on the momentum

A successful planning session can help team members bond and to get really motivated and excited about where the organisation is going. It is important to try to harness this enthusiasm, in order to get others behind your plan, and to help implement it successfully.