



Real World Team Leadership Tool 4: Team Strategic Planning

Agenda

Date: _____

Time: _____ to _____

Leader: Recorder: Timekeeper: Process Observer: Learning Observer: Parking Lot Attendant: Optional Roles:	e.g. Phone Coverage, Food, Interpreter	
Participants:		
Instructions	This is a standard format for leading effective, time-limited work sessions. Wrapped inside the generic format are the 6 steps you need that are unique to implementing Tool 4: Team Strategic Planning. Your two main objectives from this meeting are to: (1) identify future opportunities with a plan to capitalize on those with the highest priority and (2) identify future threats with a plan to manage those posing the greatest risk.	
Time	Steps of the Tool	Responsibility
10 Minutes	Meeting Overview <i>(Note: This is the standard start for all eight work session tools.)</i> <ul style="list-style-type: none"> ✓ Introduce participants, their roles in the organization, and their functions in the project ✓ Assign meeting roles and ensure that each has the tools they need for their role ✓ Confirm goals of meeting and type of meeting this is ✓ Review and finalize agenda topics and their order in this meeting (This is an example of “tell ‘em what you’re going to tell ‘em”) ✓ Assign times to each topic ✓ Confirm any groundrules or guidelines for thought and action during this/these meetings 	Leader
____ minutes	1. State Action/Plan (purpose/steps) <i>(Note: As with each of the other 7 tools, this first step after the meeting overview is for you to lay out all pertinent information, bring the others up to speed and define the scope of the situation. Skill applied here: “going wide” to produce information through brainstorming,) Broadly:</i>	Leader

	<ul style="list-style-type: none"> a) What is the end result to be optimized and protected? <ul style="list-style-type: none"> i) Use Bryson Action Mapping Tool ii) E.g. review business results, larger organizational goals/expectations, past strat plans, processes, b) What are the potential opportunities (internal strengths, external/internal situations to capitalize on)? c) What are the potential threats (internal weaknesses, external/internal situations that endanger)? d) What is the end result to be optimized and protected? e) What steps must be taken to reach the end result? f) What are the particularly critical steps? 	
____ minutes	<p>2. Anticipate Potential Opportunities (probability/desirability) (<i>Skill applied here: "coming into focus" through list analysis and prioritization.</i>) Use SWOT Tool for 2 and 3)</p> <ul style="list-style-type: none"> a) What are the specific potential opportunities? b) Rank these in terms of value and desirability of occurring. 	Participants, Leader
____ minutes	<p>3. Anticipate Potential Problems (probability/seriousness) (<i>Skills applied here: "coming into focus" through list analysis and prioritization.</i>) Based on current actions and future opportunities you listed in (2) above:</p> <ul style="list-style-type: none"> a) What might go wrong? b) What is the probability that the potential problem will occur? c) What is the seriousness if the potential problem does occur? 	Participants, Leader
____ minutes	<p>4. Anticipate Likely Causes of Opportunities and Problems (<i>a skill applied here: "going wide" to produce information through brainstorming</i>) Use Root Cause Analysis (e.g. Ishikawa Fishbone diagram)</p> <ul style="list-style-type: none"> a) What could cause this potential opportunity? b) What could cause this potential problem? 	Participants, Leader
____ minutes	<p>5. Select Preventive Actions</p> <ul style="list-style-type: none"> a) What actions can be taken to address each likely cause? b) What actions can be taken to increase the probability of the opportunities occurring? c) What actions can be taken to reduce the 	Participants, Leader

	probability of the potential problem occurring?	
____ minutes	<p>6. Select Contingent (“Plan B”) Actions (Triggers)</p> <p>a) What actions will maximize the positive effects of potential opportunities (including things you listed in (6.a) above)?</p> <p>b) What actions will minimize the effects/ seriousness of the potential problem if it does occur?</p> <p>c) What information or events will trigger each contingent action?</p>	Participants, Leader
____ minutes	<p>7. Modify Plan and Commit to Action (<i>Note: As with each of the other 7 tools, the final step is a “narrowing-in” step to bring clarity and closure to the process.</i>)</p> <p>a) How will opportunity optimizing actions be built into the plan?</p> <p>b) How will preventive actions be built into the plan?</p> <p>c) What are your backup plans (“Plan B, Plan C”)?</p> <p>d) How will this strategic plan be monitored?</p> <p>e) What are the rewards and penalties associated with this plan?</p> <p>f) Take action! (See Tool 7: Implementing)</p>	Participants, Leader
15 Minutes	<p>Administrative Wrap-up (<i>Note: This is the standard ending for all eight work session tools.</i>)</p> <ul style="list-style-type: none"> ✓ Address issues in Parking Lot ✓ Review action items and accountabilities (what by whom by when). Confirm next meeting ✓ Provide Process Observer report ✓ Provide Learning Observer report ✓ Discuss: Were the goals of this meeting met? 	Parking Atndnt Recorder Process Observer Learning Observer Participants