

# Workshop: Where Are We Going and How Do We Get There? Conducting Strategic Planning and Executing a Successful Strategy

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ACHIEVING SUCCESS THROUGH PEOPLE

## ABOUT US!

Tolero Solutions helps you *achieve success through people*. We find and fix organizational and operational problems overcoming challenges that impact productivity and profit.

On average 70% of employees are unhappy. Every unhappy employee costs ~1.5 their annual salary to replace. Do the math. The biggest asset an organization has is their people. When the people are happy and giving 100%, the customers are happy, and the organization succeeds.

We strive to make organizations better places to work. We increase your human capital's speed and ability to improve innovation and deliver excellent customer service. Driving the ability to rapidly offer new products and services and increase customer service excellence – increases profits and growth.

Tolero Solutions helps you engage and retain your biggest asset – your human capital (your people). People service your customers, solve problems, and help drive innovation. Happy people -> happy customers = increased growth.

## Session Summary



A solid strategy is the cement and mortar in the foundation of any successful organization, yet many organizations don't have a detailed and actionable strategy developed. If they do have the strategy developed it often lacks the actionable components for success.

In today's rapidly evolving business environment, organizations are often forced to remain competitive by adapting a culture of rapid change, yet all too often the strategy is not updated to reflect these changes. Developing, updating and communicating the organizations' strategy frequently doesn't occur.

New product and service developments, increased or decreased growth, or other external environmental factors may have led the organization to change direction and stray from the strategy. Creating and or updating a detailed strategy is often forgotten. So why is strategic planning important? Why conduct strategic planning? What are the components of development and execution of a successful strategy?

### This program is designed to help participants:

- So why conduct strategic planning?
  - Plan for change
  - Manage for results
  - Provide customer support
  - Increase adaptability
  - Promote communication
  - Guide management decisions
  - Remain future-oriented
- What should be considered in developing a solid strategy
- What are the key components of a solid strategy
- Who should be involved in strategic planning and how should they be involved
- How should the strategy be introduced and implemented
- How often should strategic planning occur and what should you consider it during the implementation process
- Tools, tips and templates for developing a mission, vision and strategic components including communication and change planning tools

## Session Details

- **Preferred Format:** Face to Face (short version can be customized for virtual delivery)
- **Length:** Offered in short and extended formats – 2 hour 1/2 day workshops, additional customization is available.

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## ABOUT THE FACILITATOR

**Scott Span, MSOD** is CEO & Lead Consultant of Tolero Solutions. He is an accomplished Project Management & Change Management specialist with an ongoing record of success in managing projects and programs in achieving cost schedule, and performance objectives. He has over 15 years of experience in driving programs to success, leading change initiatives and performing strategic planning, communications, facilitation and training. Through his work he helps clients in achieving success through people to create high performance organizations – organizations that are more responsive, productive and effective – where engaged employees enjoy working and customers enjoy doing business. He is an author on various topics of organizational development and generational differences and the creator of the Recruitment and Retention Lifecycle™. Scott holds a Masters in Organization Development (MSOD) from American University and the NTL Institute and is also certified in the FIRO-B and has Process Mapping and Balanced Scorecard certifications and a government security clearance.



**Maximum number of participants:** Various depending on desired organizational outcomes and format.

### Content Focus:

- Strategic Planning
- Mission and Vision Development
- Change Management
- Strategic Communication
- Leadership Development
- Process and Requirements Definition
- Team Performance

### Session Description & Learning objectives:

- Where are we now?
  - Internal/external environmental assessment
  - Customer and stakeholder identification
- Where do we want to be?
  - Mission
  - Vision
  - Targets
  - Initiatives
  - Objectives
- How do we measure our progress?
  - Performance measures and Key Performance Indicators (KPIs)
  - How do we get there?
  - Supporting strategies and initiatives
  - Action plans
  - Tracking system
- Provide participants with the components of an actionable and successful strategy including mission, vision, targets and measures
- Offer participants with a starting point, list of considerations, prior to beginning strategic planning
- Provide real life examples of a successful strategic planning process that can be used as a model for guiding the development and implementation of a new mission, vision and strategy
- Provide a foundation of understanding for the unique and sometimes daunting task of implementing, developing and or updating a strategy and conducting strategic planning
- Offer an overview of strategic planning including definitions of specific terminology often used in the strategic planning process
- Teach participants the importance of having a communications and change approach as part of strategic planning and highlight a sample methodology

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## CONTACT US

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- Inform participants of some of the possible roles and responsibilities changes that may occur associated with strategic planning
- Highlight some of the pitfalls and challenges of a strategic planning and offer tips for success for both leaders and employees
- Several useful tools and real life examples will be presented that will demonstrate how some managers have successfully overcome the challenges of merging people and technology within their organizations

### What need, problem or issue the session addresses:

- Often organizations are not certain where to start and what to include when conducting strategic planning. The session will provide a process to participants for asking and answering certain questions necessary for successful strategic planning. This session will address the strategic planning process, where to begin, what to include, and how to execute, implement and measure strategic changes. The components of a solid strategy will be provided, including a focus on both internal and external factors.

### Expected take-aways for the participants-what they will learn and how they will benefit:

- At the end of the workshop, participants will have a process for conducting strategic planning and implementing a strategy. They will receive tips of how some organizations have successfully overcome the challenges of strategic planning and implementation. Participants will benefit from leaving the session, with a process, tools and templates used with success in past strategic planning efforts, and an overall high level approach (inclusive of a change management and communications process) for strategy development and strategic planning.



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