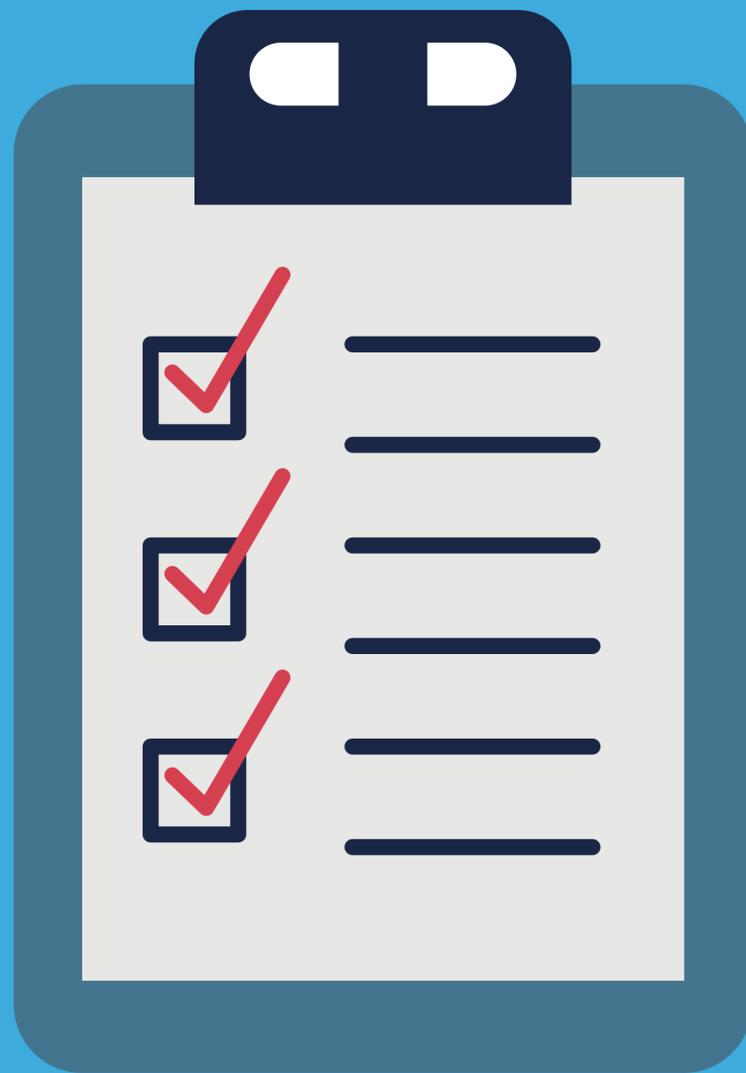


Pre-Strategic Planning Questionnaire



from **SME | STRATEGY**
MANAGEMENT CONSULTING

Business Consulting | Strategic Planning | Facilitation

Strategic planning sessions (both in-person and remote) can be extremely useful to: realign, reenergize, and refocus your leadership team.

Ideally, you and your team can walk into a planning session with specific objectives, and walk out with clear action plans.

A good strategy session can uncover key insights into the organization's current and future challenges, as well as determining the priorities and accompanying activities that will move your organization forward.

Here are some questions to ask you and your team as you prepare for your strategic plan session.

15 questions to ask your team before your strategic planning session:

1. What's the value of accomplishing your strategic plan?

- In dollars, outcomes, impact, employee engagement, growth, etc.
- What is the cost/benefit for you and your team to successfully implement your plan?

2. What's the cost to your team if you don't implement your plan successfully?

- Missed opportunities, stress, employee engagement, etc.
- What happens if nothing changes and your team stays on the same trajectory?
 - Is that good enough for you and your team?

3. Do you all agree on one approach for creating your strategic plan?

- If yes, how do you know?
- If you don't have a common approach, you'll get stuck on language and meaning, and will eventually create frustration and confusion throughout the length of your plan

4. Is your organization willing & able to change in response to the needs of your strategic plan?

- How do you know?
- Processes and systems are easy to change, but behaviors and desires are not as simple. Just because your team has adapted and changed in the past, does not mean they will in the future
 - What is your plan to drive change moving forward?

5. Why was your last strategic plan successful or unsuccessful?

- What were some of the lessons learned?
- Did you have enough process, structure and systems to support your last plan's success?
- Did you communicate enough? Was your team fully bought in and engaged? Were you tracking your progress?
- Will it be the same this time around, or will more effort be required?

6. Is your entire team going to the same place?

- Do you share the same version of success?
- If yes, how do you know?
- If you're not going to the same place, you're going to different places
 - Getting explicit buy in will avoid misunderstandings & duplicate work in the future

7. If you had to pick a core customer group to focus 70% of your time, money & energy on, who would you choose?

- Would each member of your team answer the same way?
- Throughout your implementation, you'll be faced with choices on where to prioritize delivering value
 - If your team is not 100% aligned, you'll waste time/money/opportunities
- How many different customer groups are you focused on currently?

8. Do you feel like you have more opportunities than you have time, money & energy to go after?

- Can your team accomplish them all at the same time?

9. Do you all agree on what opportunities need to be prioritized in order to move forward?

- If yes, how do you know?
- If your team doesn't have a process for prioritizing opportunities, they will all appear equal
 - Instead of choosing, your team will try to do them all (unsuccessfully) or do nothing to avoid picking wrong

10. Is your team clear on and bought into your current strategic goals?

- Do you have explicit buy in?
- When you delegate goals, your team will reluctantly accept
 - When they choose the goals themselves, they accept accountability for their own success

11. Is your current communication structure sufficient to support the implementation of your strategy?

- If yes, how do you know?
- With a flawed communication structure, information slips through the cracks, gets stuck in silos, & prevents your team from accomplishing organizational goals

12. How does your current culture contribute to or impede the success of your future goals?

- Can you describe “How we do things around here” ?
- Without clear behaviours to follow or avoid, everyone has different expectations for what is acceptable
 - This creates barriers to collaboration & teamwork

13. How will your team track & monitor the progress of your plan?

- Who is responsible for tracking?
- If you aren't tracking your progress & adapting the strategy accordingly, how will you know if you're on track or not?

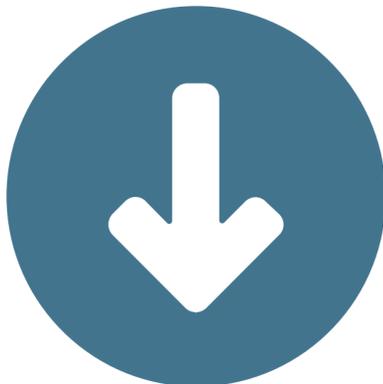
14. Who is responsible for leading implementation of the strategy?

- If everyone is leading the strategy, no one is leading the strategy

15. How much time/money/resources do you & your team expect will be required to make this plan successful?

- Do you all have the same expectations?
 - How do you know?
- What happens if you're trying to drive somewhere 100 miles away, but only have 70 miles worth of gas?

Keep scrolling



Need help with your strategic plan?

Strategic planning is about making choices. It's as much about choosing what to do as it is choosing what not to do.

These are just some questions that will lead your team into your strategic planning process.

If you're looking to have someone from outside your organization facilitate your strategic planning session or support you in implementation, contact our team to learn how we can help:

[Reach out to discuss your options](#)

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