

IN-PERSON FACILITATED SERIES

OUTWARD MINDSET

STRATEGIC PLANNING & EXECUTION

OVERVIEW

This collaborative strategic planning and implementation process enables the development and achievement of organizational objectives and strategies while fostering cross-functional alignment and accountability.

It powerfully equips executive team members to take responsibility for their impact on the overall strategy and results of an organization by helping them plan their work to enable alignment in each of four directions— towards managers, coworkers, direct reports, and customers.

Executing the plans developed in this intensive series of sessions enables executive teams to embed deep accountability into the fabric of their organization.

PREPARATORY WORK

Prior to this process, participants should complete Arbinger's foundational training, *Developing and Implementing an Outward Mindset*. After meeting this prerequisite, the strategic planning and execution process begins with an assessment of current reporting structures, performance, and major internal and external factors. This assessment can be completed as offsite pre-work.

PROGRAM FORMAT

This program can be completed in four sessions, with time between each session to complete specific assignments. The time needed for each session will depend upon the size of the group and the complexity of the organization.

In the first session, participants begin developing a one-year plan for the organization. Completing this step first helps the organization more fully understand its capabilities and envision the results that are possible if people within the organization work together in a responsive and collaborative way.

With the outline of an organizational one-year plan in place, participants adjourn to develop individual work plans and budgets that will contribute to the success of the organization.

They then reconvene to present these plans, offer and receive feedback and help, and finalize an organizational one-year plan founded on collaborative cross-functional alignment.

In the third session, participants develop an implementation plan that outlines the reporting patterns, mechanisms, and

frequencies required to achieve the identified organizational results.

Finally, the one-year plan is used as a baseline for a visioning exercise in which participants develop an attainable long-range plan.

RESULTS & OUTCOMES

Through engaging in this process, participants will be enabled to:

- Understand the impact of their work in order to plan and align their work with overall organizational objectives
- Develop key metrics to track, improve, and report impact in a way that invites and reinforces an outward focus
- Develop practices that invite transparency, heightened accountability, and collaborative problem-solving
- Engage people at all levels of the organization in planning and implementation, fostering broad ownership and support of the strategic plan
- Embed outward mindset into the fabric of the organization

Sample Strategic Planning and Execution Program

WORKSHOPS	ACTIVITIES	DELIVERABLES
	<p>Review and Establish:</p> <ul style="list-style-type: none"> – Organizational strategic objectives – Key Performance Indicators – One-year organizational objectives – Key workflows and roles – Organizational reporting structure – Individual objectives for executives 	<p>Establishment or clarification of strategic priorities and objectives, KPIs, and reporting structure</p>
	<p>Develop:</p> <ul style="list-style-type: none"> – One-year individual work plans for executive team members – One-year budgets for executive team members 	<p>Establishment or clarification of individual work plans and budgets, including measurable goals, objectives, and tasks</p>
	<p>Review and Refine:</p> <ul style="list-style-type: none"> – Individual work plans – Individual budgets – Consolidated organizational one-year plan 	<p>Each team member offers and receives feedback and help on individual work plan</p> <p>Collaborative alignment across functions</p>
	<p>Plan Implementation:</p> <ul style="list-style-type: none"> – Optimize one-year plan – Determine reporting patterns and frequencies – Establish or refine reporting mechanisms 	<p>Organizational implementation plan</p> <p>Outward mindset culture to accomplish the plan</p>
	<p>Look Ahead:</p> <ul style="list-style-type: none"> – Ask big purpose questions – Envision the future: Five-year vision – Scale objectives and reporting structure – Forecast five-year financial picture 	<p>Five-year strategic plan that includes clear objectives and financial forecasts</p>