

This template will help you structure your own strategic planning process. You could set aside a day, two days, or schedule a series of discussions to undertake this straightforward and effective planning process.

Pre-Session

Collate and distribute information:

- Report on progress to date mapped against current objectives.
- Environment scan: what is changing and what is staying the same in our industry for competitors, customers, suppliers, regulatory and operating systems?
- Fresh thinking prompts:
 - One or two thought-provoking articles
 - A starter question to seek feedback from everyone at the start of the session.

1. Our starting point

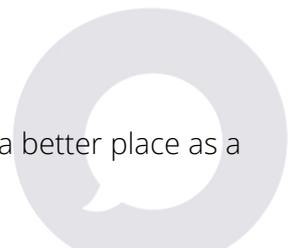
Start by clarifying who you are and where you are right now.

- What is our reason for being, our core purpose?
- What have we achieved since last session?
- What have we learnt about ourselves, the way we operate and the environment we operate in?
- What should we be excited or concerned about?

2. Our shared ambitions

Set a timeframe (e.g. 3 years, 5 years, 1 year):

- What does the future look like – for our sector, for our stakeholders?
- What changes in our sector and around us are accelerating/declining?
- If we could do anything for anyone, what could that be? How would the world be a better place as a result of our contribution?
- What is our agreed purpose for our organisation – who we are, who we serve and what difference we want to make into the future?



3. Keys to success

Connect the dots between our starting point and our future ambition:

- What needs to go right, and what will make it more difficult for us to achieve our ambition? For example, if we were mapping our progress on a board game, what would be the snakes and ladders?
- What are the factors that will have the biggest impact on us achieving our ambitions?
- Once these are all identified, highlight the 3–5 areas of focus that are likely to have the biggest impact on achieving your ambition.

4. Strategic priorities

For each of these 3–5 focus areas:

- What needs to change?
- What are the options for change?
- What actions are achievable and will have impact?
- For these priorities, what would be our first and next steps?

5. Commitments and reflections

- Confirm consensus agreements.
- Identify outstanding issues and how they will be addressed.
- Seek individual reflections on the meeting, and the future.

Post-Session

- Restate the key agreements in a concise report.
- Develop an implementation plan with key tasks, timelines and responsibilities.
- Communicate your shared story.
- Establish a monitoring and review process.