



Strategic Planning Checklist

Strategic Planning takes planning. Here's a checklist to help you get the most out of your time.

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- Secure an off-site location so there are less distractions.** Provide refreshments, coffee, sodas, water, light snacks and other food that will keep your team energized.
- Schedule several half-day sessions or two days back-to-back.** Half-day sessions, spaced out over a few weeks, are ideal, as this gives your team the opportunity to reflect on their input, gather needed data and see things from a different perspective over time.
- Determine who will be participating in your planning sessions.** Sometimes it can be beneficial to bring in additional employees or outsiders who can help the executive team think bigger.
- Hire a skilled strategic planning facilitator to help the process go well.** An outsider can keep the team focused and make the process more effective and efficient. A good facilitator will lay out ground rules of engagement and provide your team with advanced planning documents.
- Gather financial data in advance and give it to all participants.** Include standard documents (P&L, Balance Sheet) and other financial information specific to product and service lines; especially those that will be focused on for strategy changes.
- Review prior strategic plans in advance and have your team prepare to discuss critical changes since your last planning session.**
- Gather all survey summaries and other research documents for reference in planning.**
- Be prepared for robust conversations and enjoy the process.** After all, you are creating the roadmap for your company's future!