

STRATEGIC PLANNING CADENCE

STRATEGY KICK-OFF

PURPOSE	Introduce elements of planning; explain the planning cadence; develop first draft of multi-year plan; generate excitement for future improvement and growth
FORMAT	Workshop (face-to-face or video conference) featuring group presentations, discussions, and activities/exercises
DURATION	1-2 days
PREPARATION	Identify trends, top three strengths, top three weaknesses, and description of core customers/clients (those who are most profitable/best served)
PARTICIPANTS	Leadership team, board members, and other stakeholders and/or thought partners
LEADER	Grindstone Strategic Facilitator

QUARTERLY REVIEW

PURPOSE	Review progress in implementing plan and celebrate successes; identify and discuss changes in industry, marketplace, and/or organization and adjust plan accordingly; develop components of quarterly focus
FORMAT	Workshop (face-to-face or video conference) featuring group presentations, discussions, and activities/exercises
DURATION	1 day
PREPARATION	Update quarterly targets
PARTICIPANTS	Leadership team
LEADER	Grindstone Strategic Facilitator

MONTHLY CHECK-IN

PURPOSE	Identify any obstacles in executing plan; celebrate successes
FORMAT	Meeting
DURATION	1 hour
PREPARATION	Review targets
PARTICIPANTS	Leadership team
LEADER	President/CEO

WEEKLY COACHING

PURPOSE	Support president/CEO in clearing roadblocks and motivating team
FORMAT	1:1 video conference
DURATION	45-minute sessions on first, second, and third week of each month with unlimited brief calls, texts, email in between
PREPARATION	Identify topics to address; agenda driven by the president/CEO
PARTICIPANTS	President/CEO
LEADER	Grindstone Strategic Coach

WEEKLY HUDDLE

15-min stand-up meeting led by President/CEO to focus all team members on plan priorities