



Seven Lessons Learned

Facilitating hundreds of planning sessions has reinforced some important lessons. Here are seven things to consider.

Build rapport with the Champion prior to the first session.



- Schedule a two-hour meeting with the senior person in the session. That person is the ‘champion’ for the process and your client.
- Ask enough questions about the current situation to develop a rich understanding of the organization, particularly its challenges.
- Ensure the champion understands the process and agrees with the utility of the product – e.g. a strategic framework.

Show confidence in the process and don't deviate.

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- The start of a planning session is critical. The Champion should provide introductory remarks which you have provided, and they should formally transfer the meeting leadership to you.
- Ensure that participants know they are utilizing a proven approach.
- Always forestall participant's objections or questions about the process, by indicating there is a sound reason for your methodology and that it works every time.
- Never permit participants to revamp the process. That is certain death.

Remember that clients define the challenges and identify solutions.

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- Undoubtedly, you will feel responsible, but you are not accountable for the quality of the ideas generated.
- Your job is to create an environment that permits an abundance of focused discussion, idea generation and decision-making.
- Remember that the process provides the relevant questions. Stick with the process and the clients will answer the questions.

Each strategic planning session is a mini-MBA course.

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- As you build experiences you will see patterns across organizations.
- You can also expect new insights into organizational behaviour during each client engagement.

Let contentious moments play out.

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- Given the importance of the planning sessions there should be active discussion, debate and even productive conflict.
- It is your job to identify the motivation when there is conflict – Is it entirely conceptual? Is it interpersonal? Is it territorial? Is it directly related to the issue at hand?
- Your job is to find ways to work through these periods, without sidestepping them.

Innovation is in the execution, while clarity is in the strategic direction


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- A strategic planning session's success does not ride on creating a shiny new toy.
- That is not to say breakthroughs cannot be expected from the process, but above all clarity should be generated – in answering the questions about where we are headed and how we will know when we get there.
- Innovation should be expected in the execution of the plan, in new elements of a business model, or breakthroughs in process improvements, or in product development.

Use what you learned in previous sessions to ask pre-planning questions with new clients



- Use your prior experience to engage new clients with confidence especially in the pre-planning meetings.
- Have a set of questions that encompass each of the functions of an organization and the external environment.



Practice makes perfect, but we don't need perfection
to provide real value to our clients.

