

## CLIENT Strategic Planning Activities Timeline – Actual example

Date	Time	Activity/event	Objective	Prep
<b>Dec. 12</b>	9:30 – 10:30 – <i>onsite</i>	Exec Team meeting	Set expectations for exec team re: roles, types of activities associated with strategic planning process and related activities and dates, mission/vision session, ways of involving others in the organization	Nancy to prepare handout and flipchart to illustrate
<b>Week of Dec 8</b>	Ongoing – <i>virtual, in-person or a combination</i>	Phone interviews with exec team members and other team leaders	Gather input, ideas and perspectives to help determine best process and format for overall strategic planning process	Nancy to create interview documents and will schedule interviews directly with participants
<b>Dec. 16</b>	10-11  <i>Preferably in person, may be virtual or hybrid</i>	Departmental all-hands meetings	Set expectations for overall strategy planning process, ways of getting involved, activities and process overview, intended outcome of planning effort	Similar to above
<b>Dec 17</b>	Ongoing  <i>Virtual -Leave it open for 3 weeks</i>	Open asynch session for online participation	Solicit ideas, opinions, gather input, etc. at various junctures of the planning process	Client review of questions
<b>Jan 6</b>	8-1  <i>In person</i>	Mission/vision/principles workshop	Gain agreement on mission/vision that will be enabled by strategic plan – exec team as participants	Nancy to create workshop overview document to send a few working days in advance

<b>Jan 9</b>	All day <i>In person</i>	Large-group brainstorming session	Agree on strategic priorities, brainstorm ideas, focus in on a handful of priorities for tactical planning and assign to subteams	Same as above
<b>Jan 12</b>	Subteams named, have 2+ weeks to come back to Roger and team	Roger and team determine subteams and assign tasks	Flesh out tactical plans, including timing, resource requirements, expected ROI, etc.	Create template and process for small teams
<b>Week of Feb 3</b>	Half-day <i>In person</i>	Small teams to present key idea and proposals to Roger and team	Create foundational content for strategic planning proposal; determine which priorities merit the greatest emphasis, etc.	Roger and team need criteria for making decisions—criteria needs to be revealed to subteams in advance
<b>Week of Feb 10</b>	Ongoing – <i>in person or remote</i>	Strategic planning proposal completed	Prepare final content, format, flow, etc. for presentation to Jen	Create template for proposal and presentation