



Cliff Quicksell Associates
www.QuickSellSpeaks.com

YEARLY STRATEGIC PLANNING CHECKLIST

A strategic planning meeting should be held at least once a year and should include all executive managers as well as any key supervisors with front-line knowledge and experience. Bring a copy of your company's business plan to the meeting so it can be referred to when needed. Keep in mind the purpose of the meeting, which is to evaluate past projects and goals and to develop new strategies based on opportunities discovered through market research and analysis.

The following list can help create a more effective strategic planning meeting:

- The meeting should be held off-site in a casual setting so participants will feel relaxed but away from distractions.
- Make sure everyone knows that each person will be treated as an equal and everyone will have an equal voice in terms of suggestions and criticisms.
- To promote a more comfortable atmosphere, have everyone dress in casual clothing.
- Encourage discussion of subjects mentioned in the meeting. This will not only encourage more brainstorming as the meeting progresses, but it will also serve to fully define the subject and determine its merits.
- Don't let the meeting digress into endless criticism. Point out areas that merit praise, and when discussing areas of weakness, explain how certain suggestions may not fit into the overall scope of the company's strategy.
- Don't try to prioritize items brought up in the meeting. The strategic planning meeting is mainly a brainstorming session where ideas are explored in relation to their strategic impact on the business.
- Don't assume that everyone will come with a notepad and pen. Make sure you provide both.
- Make sure you cover each topic thoroughly before progressing to the next. Keep in mind that you are exploring strategic solutions. When discussing each subject, apply timelines for specific actions after the meeting has been adjourned.
- Write a summary of the meeting and circulate it to everyone who is part of the strategic planning team. Then, make sure you have follow-up meetings to review each person's progress.