

## Facilitation Framework for Corporate Strategic Planning

*“Peter’s facilitation skills are outstanding. Anyone having the opportunity to experience a group facilitation session with Peter will see the depth of knowledge and experience he demonstrates”.*

Paul Cooper FCPA, Director - Cooper Reeves, Ex President CPA Qld

**Our facilitation process for Corporations includes the following stages:**

1. Clarity and certainty of desired outcomes through initial conversations with all key stakeholders prior to the facilitation.
2. Undertaking the facilitation process, with 1. in mind. (see below)
3. A debrief afterwards (normally less than 1 week later) to ensure success and where to from here.
4. Engagement for accountability to the success of the plan, as desired.

**Our effective facilitation has as desired outcomes to provide:**

- **objectivity** in a team process where high level outcomes are desired
- **agreement and ownership** to these high level outcomes
- **direction** to ensure you stay on track to achieve the agreed outcomes
- **focus** to ensure the process is completed on time
- **fluidity and intensity** to bring the best out in every one
- **a sense of fun** when needed

**We do not:**

1. Write your business plan. This is completed in house by you, the client.
2. Do any of the financial compilation for budgets etc. This is completed in house by you, the client.

**The Process on the day - generally**

Our Facilitation can include the following stages on the day:

1. **Rapport build** between all parties to ensure trust on the day
2. **Rules of engagement** including confidentiality
3. Agreement of **specific outcomes** for the day/days
4. Check for any “Sacred Cows” or “Elephants in the Room” that could sabotage the success of the day
5. Review of the past year to gauge issues needing to be addressed and learned from. This can include creation of the Corporations **Guiding Principles** (ie the biggest learnings the business has had in the year that, if kept front of mind in the ensuing year will create the opportunity for success).
6. Create a SWOT analysis, if this is needed.
7. Review of, or Creation of, corporate **Purpose Statement**. This is the “Why” are we here. It is essential as a front of mind reminder of the organisations deep

- reason for existing, and when done well can effectively change the culture for the positive.
8. Depending on the term of the Strategic Plan being addressed, create annual, and longer term **strategic outcomes** under the core areas of the business
  9. Drill down to the “how” this is all going to be achieved in the agreed timeframes.
  10. Create a **specific and accountable action plan** from the day that is followed up and championed as agreed.
  11. **Close**, ensuring all outcomes have been achieved, and where to from here. This close may include a process that acknowledges everyone’s efforts and contributions.

### Optional processes, depending on the outcomes desired from the key stakeholders.

1. On the day practical exercises that are designed to highlight and work with any areas that are considered a weakness of the management or leadership team. These could include:
  - Leadership skills
  - Management skills
  - Teamwork
  - Communication
  - Other, as discussed and agreed
2. Celebration or “off-site events to close the process. It is essential to determine, if undertaking this style of event, whether it is for the purpose of:
  - Purely for fun and celebration
  - To drive home any specific learnings or issues addressed during the facilitation
  - Other reason??
3. Ongoing accountability to the Plan, including individual or group style coaching or mentoring.
4. Facilitation of monthly Executive and Leadership team meetings to keep the Plan on track.

### Investment / Cost

To be determined, based on the size and or type of engagement.