

One day strategic planning workshop

Facilitation guide



**STRATEGY
FIELD GUIDE**

Create organisational clarity in one day

— Do you need to develop a new strategic plan for your organisation or team, but don't know where to start?

This guide sets out a proven, straightforward approach to facilitating a simple, but effective, one day strategic planning workshop that will quickly clarify the strategic direction of any organisation or team. At the end of the day, you will have worked your way through a one-page strategic plan that you can share with and use to guide your organisation.

This facilitation guide sets out an approach, including supporting documentation, such as agendas and facilitation notes, and links to a tool for capturing and communicating the outputs, the [Team Alignment Canvas](#).

We've developed the Team Alignment Canvas for organisations and teams to clarify and communicate their strategic direction. The canvas is based on author Patrick Lencioni's six questions that every organisation needs to answer to succeed, as presented in his book, [The Advantage](#).

Before starting, we recommend reading our [article on Lencioni's six questions](#), which provides background information behind each question.

If you have the time, we also encourage you to take a deep dive and read *The Advantage* (you can buy it here: [AU](#) • [UK](#) • [US](#)). Or, if that's a time commitment you can't afford, you can just start with our [book summary](#).

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PLANNING

Schedule the strategy workshop

The first step is to organise a strategy workshop for you and your leadership team to work through Lencioni's six questions that make up the Team Alignment Canvas.

We recommend scheduling a full day workshop at least two weeks in advance, to provide adequate thinking and preparation time for participants.

The workshop is best hosted offsite from the office, to create space from distractions, in a room that can comfortably accommodate the full team seated at one table, and with plenty of wall space for sticking up butcher's paper or flip charts to capture the team's thinking. It's essential that the room has a whiteboard, and - ideally - a computer and projector (although this is optional).

At least two weeks before the workshop, send an invite to your leadership team, with the subject "Strategic alignment workshop" and state the workshop purpose in the body, as follows: "The purpose of this workshop is to clarify our strategic direction and ensure we're all clear on how we're going to succeed as a team".

Include a copy of the Team Alignment Canvas, presenting it as a vision of the end point that the team will be working toward. You can [download a copy of the canvas](#) from the Strategy Field Guide website.

"Creating alignment at the executive level is essential to building and maintaining a healthy organisation"

– PATRICK LENCIONI

E-mail template to send

To get everyone ready, we've put together an e-mail template to send to your leadership team one week ahead of the workshop. Send this separately (as a follow up) to the original workshop invite.

To Leadership team
Subject RE: Strategic alignment workshop
<p>Hi team!</p> <p>I'm looking forward to our upcoming strategic alignment workshop.</p> <p>Below is our agenda for the session, as well as some useful links to get you ready to participate to your fullest on the day. The purpose of this workshop is to clarify our strategic direction and ensure we're all clear on how we're going to succeed as a team.</p> <p>The workshop will start at 8:30 am sharp, so please arrive by no later than 8:15 am.</p> <p>Agenda</p> <ol style="list-style-type: none">1. Introduction and overview2. Warm up3. Why do we exist?4. How will we succeed?5. What do we do?6. Recap7. Who must do what?8. How will we behave?9. What's most important, right now?10. Wrap up <p>Things to do before the session:</p> <ul style="list-style-type: none">• Review the Team Alignment Canvas template, which we will populate on the day: http://sfgui.de/VyGfbO• Read this article on author Patrick Lencioni's six questions that high performing organisations need to answer, and start thinking about how you might answer these in our context: https://sfgui.de/ERzuTz• Watch this short video on the six questions: https://youtu.be/TXDKo6zT6U8• Watch this short 'start with why' TED Talk by Simon Sinek, and think about what our 'why' is: https://youtu.be/IPYeClXpxw <p>Thanks everyone!</p>

To use a facilitator, or not to use a facilitator

In an ideal world, we recommend arranging a facilitator to come along and run the workshop. Doing so will allow you as the leader to fully participate in and enjoy the day.

However, we understand that many organisations don't have the means to engage a facilitator and/or don't have an established relationship with a facilitator that they can trust with this important exercise. And that's fine: we have developed this guide with a leader/facilitator in mind, to walk you through a practical, easy to follow step by step approach. Our experience is that leader-led sessions still work well.

If you can arrange a facilitator, we recommend meeting with them at least three or four weeks in advance of the workshop, so you can share this guide with them and talk through your expectations. We of course recommend that they largely stick to the tried and tested process we've set out below; however, it's also understandable that some facilitators will wish to make minor adjustments to reflect their own style.

BEFORE YOU LEAVE THE OFFICE

Workshop packing checklist

Make sure you take the following with you to the workshop venue:

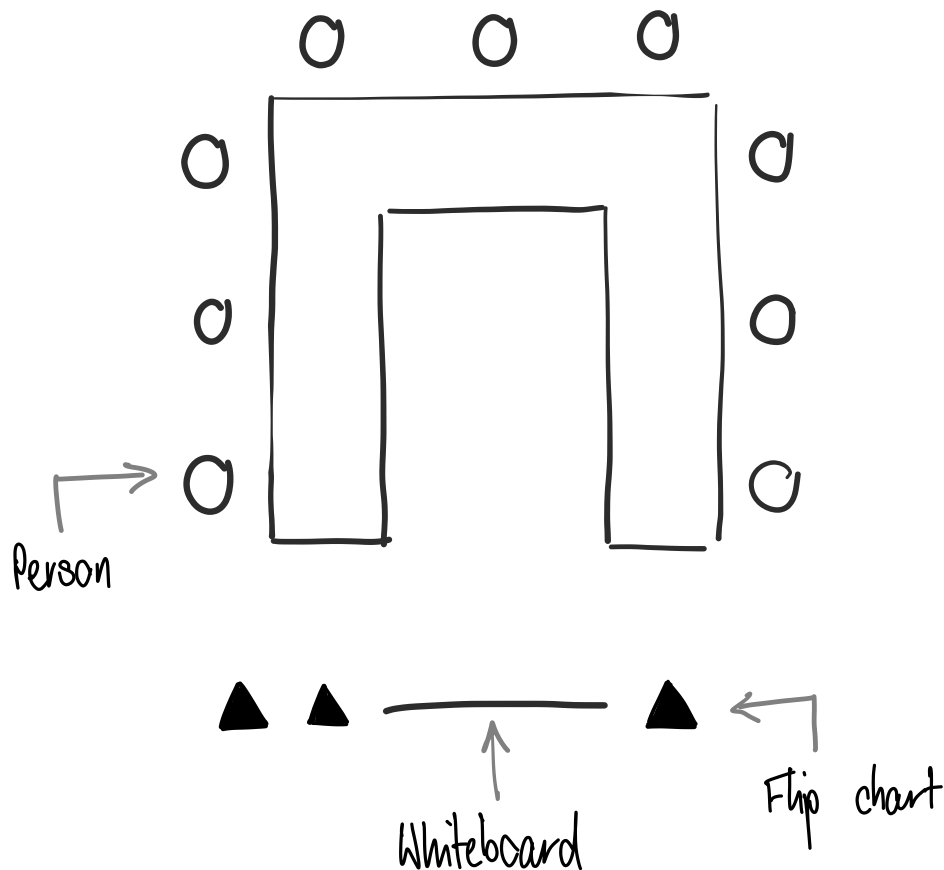
- Flip charts or butcher's paper, and Blu Tack or adhesive tape
- Whiteboard markers in a few colours
- Pens for each participant
- Plenty of paper for people to make notes on
- A3/Ledger copies of the Team Alignment Canvas for each participant
- A4/Letter copies of the agenda (i.e. two pages starting from page 8) for each participant
- Copies of our ['Discover how your organisation will succeed'](#) cheat sheet for each participant
- Copy of this guide for each facilitator
- Your phone for taking photos

BEFORE YOU START

Room setup checklist

Get the room setup early, so no time is wasted once everyone arrives.

- Setup three flipcharts or stick three pieces of butcher's paper on the wall at the front of the room, and title one of them 'Actions' and another 'Parking lot'. Use these throughout the day to capture actions as they arise and to park issues that might pop and threaten to distract the team. The third will be used as a working area at various times throughout the day
- Arrange the tables in a 'U' shape
- Make sure the whiteboard is clean and centred at the front of the room
- Place one copy of the agenda, one copy of the Team Alignment Canvas, one copy of the cheat sheet, a handful of blank pieces of paper and a pen at each participant's place



Agenda

Workshop purpose: Clarify our strategic direction and ensure we're all clear on how we're going to succeed as a team

Item ¹	Start time
1. Introduction and overview Create alignment amongst the team on the purpose of the workshop, the process (i.e. agenda) and the day's outputs	8:30
2. Warm up Loosen everyone up mentally, so we're ready to attack the day with vigour	8:45
3. Why do we exist? Identify the organisation's core purpose or fundamental reason for being	9:00
Morning tea break	10:30
4. How will we succeed? Identify strategies that the organisation will employ to achieve its why and against which future decisions can be tested	10:45
5. What do we do? List the key activities and processes that the organisation undertakes, to action its strategies for success and deliver on its core purpose	11:45
Lunch break	12:00
6. Recap Summarise progress from the morning, to consolidate learning and create shared clarity on the golden circle model (i.e. why, how and what)	12:45

¹ In the agenda, substitute the word 'organisation' with team, business unit, division etc. to reflect the area to which your strategic plan will apply

Item ¹	Start time
<p>7. Who must do what? Define each of the roles and responsibilities between team members</p>	13:00
<p>8. How will we behave? Identify the organisation's values, which define the essence of the organisation's culture and way of working</p>	13:15
<p>Afternoon tea break</p>	14:45
<p>9. What's most important, right now? Identify the organisation's key objectives</p>	15:00
<p>10. Wrap up Reflect on the day's outputs, to celebrate the team's work and cement alignment amongst them</p>	16:30

Facilitation tips

Once things have kicked off, here's a few tips to make sure it all goes smoothly.

Start with the end in mind

Spend more time than feels comfortable at the beginning of the day to clarify and re-clarify the purpose of the workshop and the outcomes to be delivered. Find opportunities to repeat and reinforce this throughout the day. The clearer everyone is on the destination, the better everyone can work together towards it.

Don't skip the icebreaker

Icebreakers sometimes have a bad name, but – when executed well – they can invigorate a team and get things off on the right foot. If you think your team might roll their eyes at the mention of it, just relabel it something like 'warm up', 'check in' or 'quiz' (depending on what it is).

Use a notetaker

If you can afford the extra set of hands, bring someone else along who's specifically tasked with recording notes from the day, especially actions and follow up discussion topics. While they will end up duplicating a lot of what you capture on the whiteboard and butcher's paper, they will provide you with a 'safety net' that allows you to prioritise facilitation over note-taking at crucial moments.

Momentum not perfection

Any strategic plan is better than no plan. Don't try and perfect your plan before actioning it – just make sure it's directionally correct and start! You can always polish it later, as you progress the plan and learn what works and what can be improved.

Limit over-contributors

In every group, there will be one or two people who tend to dominate the conversation. Often these can be the most senior people in the room. Counter this by actively drawing others into the conversation (e.g. 'What do you think, Kate?') or doing a 'round the room' to get everyone's input, one at a time.

Use the parking lot to keep things on track

When you find the conversation going off track, hit pause on it and capture the topic on the parking lot (setup on butcher's paper at the beginning of the day). This will allow the person raising the topic to feel heard and you to get the session back on track.

Keep to time

We have allowed a modest degree of float in the agenda, which should allow you to complete each of the exercises in the allotted time. The risk of running over time on one topic is that you start to get a backlog of work that can't be completed on the day. Ask the notetaker to let you know when there's five minutes left (or set an alarm for each session), and let the group know you have five minutes to wrap things up.

Set some ground rules

At the start of the day, set some ground rules that will guide how you expect the team to participate throughout the day (e.g. challenge robustly and listen generously, be assertive and open-minded etc.). Place them on a big sheet on the wall and invite people to hold one another accountable to them.

Facilitation plan

Once things have kicked off, here's a few tips to make sure it all goes smoothly, organised by agenda item.

1. Introduction and overview

Purpose	Create alignment amongst the team on the purpose of the workshop, the process (i.e. agenda) and the day's outputs
Output	N/A
Start	8:30
Duration	15 min
	<ul style="list-style-type: none">• Welcome everyone and sincerely thank them for taking a whole day out of their busy schedules - while this stuff is more important than anything else you will do as a team, it's usually hard for people to carve out a day to concentrate on it• The single thing you want people to be clearest on is the purpose of the workshop, which is to create clarity and alignment on the strategic direction of the organisation and how you will succeed in the future• Handout a copy of the Team Alignment Canvas and explain that, by the end of the day, you will have drafted answers to each of the six questions• Handout a copy of the agenda and briefly walk through it, highlighting the link between each agenda item and each question on the Team Alignment Canvas, as well as breaks• Go through any housekeeping, pointing out safety procedures and emergency exits, where the toilets are, where/when breaks will be held etc.

2. Warm up

Purpose	Loosen everyone up mentally, so we're ready to attack the rest of the agenda with vigour
Output	N/A
Start	8:45
Duration	15 min
	<ul style="list-style-type: none">• Ice breakers sometimes have a bad name with some people who might write them off as a touchy feely waste of time, but they're very important for getting people loosened up and in a reasonable state of flow, before you start the real work. By the end of the exercise, you want people to be loosened up and uninhibited in letting their thinking flow into the team discussion and brainstorming that will follow• It is especially important today, as the first question that the team will be tackling - Why do we exist? - is the most important one and you want everyone sharp and ready from the get-go• A simple ice breaker exercise is to ask everyone to take a blank sheet of paper and write the letters of the alphabet in a column down the left-hand side of the page• Next, give them a limited period, say 5 min, to individually write down the first name of only one person from your organisation starting with each letter (e.g. A for Andy, B for Betty and so on)• Once time is up, ask each person to swap their sheet with the person next to them• Go through the alphabet, one letter at a time, and ask everyone to shout out the names they came up with - everyone should score their neighbour's sheet by ticking each letter of the alphabet with a correct answer (maximum one tick per letter)• Ask each person to tally up the ticks and return the sheet to their neighbour with a score out of 26• Have everyone put their hand up, then count up from 1 to 26, asking people to drop their hand, once their score has been reached. As the count progresses, the numbers will dwindle until you have a winner (or tied winners)• We've collated some tips and tricks, and ideas for ice breakers here: https://www.strategyfieldguide.com/articles/breaking-the-ice/

3. Why do we exist?

Purpose	Identify the organisation's core purpose or fundamental reason for being
Output	A draft purpose statement on a single piece of butcher's paper
Start	9:00
Duration	1.5 hr
<ul style="list-style-type: none"> • This is the single most important question on which to get clarity and alignment amongst the team, so a significant amount of time needs to be dedicated to working it through • Start by reminding everyone of the Simon Sinek 'start with why' TED Talk where he explains his golden circle model. The focus of this session is on the organisation's 'why' and hopefully each team member has spent some time reflecting on what your 'why' is • Ask everyone to take a blank piece of paper and spend 10 min quietly writing down as many answers to the questions: why do we exist? What is our core purpose? What is our fundamental reason for being? The more answers the better: this step is about quantity, not quality • After 10 min, ask everyone to scan their page and select what they consider to be the best answer and write it at the top of a second page. When everyone has finished, go around one person at a time and ask them to read out their distilled purpose statement and write it on a flip chart • It is likely that you will have a range of answers, but with one or two common themes • With the group's help, craft a very rough purpose statement (very rough is all that is needed at this point) that captures the common theme and write it at the top of the whiteboard • In his book <i>Start With Why</i>, Simon Sinek recommends using the following why statement format: "To ___ so that ___" • Ask the group to reflect on the rough statement, recursively using the question 'What would be the benefit of that?' and write down the answer just beneath the original statement. Repeat this process and boil the statement down as far as you can, but stop before you reach an answer along the lines of 'to make the world a better place' • The intent here is to leverage the 80/20 rule and get a statement that is directionally sound: don't worry about wordsmithing today, as it will waste time that can be better used for other work. Once the team is satisfied that the statement is directionally sound and at least 80% of the way to be being correct, stop and write the final statement as big as possible on a fresh piece of butcher's paper and stick it prominently on the wall. This statement will be the guiding beacon for the rest of the day <p>Refer to our article on the six questions, to see some example purpose statements</p>	

4. How will we succeed?

Purpose	Identify strategies that the organisation will employ to achieve its 'why' and against which future decisions can be tested
Output	A short list of (ideally three or fewer) strategies written up, one per piece of butcher's paper
Start	10:45
Duration	1 hr
	<ul style="list-style-type: none">• In Simon Sinek's golden circle model, the 'how' is the most difficult concept to explain to others. In our experience, it is easiest to define the how using two complementary approaches• First clarify what it is not. It is neither the why (i.e. it is not an organisation's mission or core purpose) or the what (i.e. it is not a task or process to be completed). Instead the how is a small set of strategies that an organisation uses to differentiate itself from its competitors or peers, and against which all decisions can be tested for alignment with the organisation's why• Next, we find it is best to walk the group through example how statements, which will illustrate the concept to them. To do this, pause and ask everyone to pick up the 'Discover how your organisation will succeed' cheat sheet and spend a few minutes quietly reading it, before returning to the group to ask any clarifying questions or share any comments on the concept• Once you've ensured that each person understands the concept, ask everyone to take a piece of paper and spend five minutes thinking about one or two how statements for the organisation. Ask them, what are the strategies that we must employ going forward to ensure we can achieve our why?• When they're finished, go around the room and ask each person one at a time to share one how statement that they've come up with and capture each of them on the whiteboard• Given the abstract nature of the how concept, you will find that some people share things that are clearly 'what we do' or 'why we exist' statements. If it's more of a 'what we do', help people by asking them something like, 'Let's go a bit deeper on that, tell me: what would be the benefit of doing that?'. If they suggest something closer to a purpose statement, try asking them 'Let's step back from that, tell me: what are some of the ways we could go about achieving that outcome?'. Either way, try and facilitate the person towards a more well-formed how statement• Once everyone has had a chance to share one suggestion, invite anyone to add any other ideas they might have come up with and add them to the whiteboard as well• Now facilitate an open discussion on what people observe and invite them to draw links and identify common themes across all the ideas on the whiteboard, marking each different theme or group with a different coloured marker

- Through the discussion, and with guidance from the team, work towards developing a refined, small set of (ideally three or less) strategies for success
- If after a reasonable period of discussion (say, 30 min) the group can't agree on three strategies, invite the leader - having regard to all the arguments that have been shared - to make an on the spot call on which three strategies the team should adopt. If they can't do that, capture an action for the leader to review and decide within an agreed period of time
- Finally, write each of the agreed three (or fewer) strategies on a clean sheet of butcher's paper and stick them to the wall (if the team didn't arrive at just three, write up whatever short list they came up with)
- Take a photo of the whiteboard and wipe it clean

5. What do we do?

Purpose	List the key activities and processes that the organisation undertakes, to action its strategies for success and deliver on its core purpose
Output	A list of key activities and processes on the whiteboard
Start	11:45
Duration	15 min
	<ul style="list-style-type: none">• Ask each person to take a blank piece of paper and spend 10 min individually brainstorming a list of the key activities and processes that the organisation must undertake to action its strategies for success and deliver on its core purpose. This list should include all supporting and enabling processes (e.g. human resources, accounting activities etc.). This is a high volume and not especially deep-thinking exercise - just ask people to get it all down on the page• Once each person finishes their list, ask them to hand it in and head off for the lunch break• While everyone is at lunch, process each sheet and write the responses up on the whiteboard, taking the opportunity to consolidate/eliminate similar responses and ensure that everything can fit on one side of the whiteboard• Once complete, take a photo of the whiteboard and file away the individual sheets of paper for later reference• Arrange the room so that, working left to right, you have the piece of butcher's paper stuck on the wall with the purpose statement (why); then the sheets with each of the strategies to the success (how) to the right of that; and then the whiteboard with the key activities and tasks (what) to the right of that• Go and enjoy some lunch!

6. Recap

Purpose	Summarise progress from the morning, to consolidate learning and clarity on the golden circle model (i.e. why, how and what)
Start	12:45
Duration	15 min
	<ul style="list-style-type: none">• If the room has a projector: Play the short version of Simon Sinek's TED Talk on the golden circle model (why/how/what), which you can find here: https://youtu.be/IPYeClTpxw. This will be the second time everyone has seen it, since you included it in your pre-workshop e-mail• If the room doesn't have a projector: Take a piece of butcher's paper and present Simon Sinek's golden circle model, ensuring the point is made that great organisations a) know their 'why' and b) work from the inside out, to 'start with why' (you will obviously need to familiarise yourself well with the model before the workshop)• Have everyone stand up and come and stand with you next to a blank piece of butcher's paper, before drawing the blank golden circle model (i.e. the three concentric rings) and writing the words 'why', 'how' and 'what' in their respective places to embed the learning on the model• With the golden circle model in mind, lead the group through a recap of the morning's output, starting with why statement on the wall, before moving on to the how (strategies for success) and then finally arriving at the whiteboard summary of the what (key tasks and activities)• Invite observations from the team and facilitate discussion on obvious improvement opportunities and the extent to which it resonates with people. The purpose of this discussion is to elevate people's thinking beyond their understanding of 'what' the organisation does to 'why' the organisation does it, and to begin to cement the why/how/what that they've developed, as this will collectively guide the afternoon's work• This is also an opportunity to check in on the coherence of the why, how and what that the team has come up. If obvious, easy to fix conflicts are identified, fix them on the spot. If they're going to take more than a few minutes to discuss and address, capture an action instead• Finally, take a photo of the whiteboard and wipe it clean for the next exercise. Leave the why and how statements where they are on the wall

7. Who must do what?

Purpose	Define each of the roles and responsibilities between leadership team members
Output	A brief description of each member of the leadership team's role
Start	13:00
Duration	15 min
	<ul style="list-style-type: none">• Ask each member to take a blank piece of paper and quickly jot down a high-level description of their respective areas of responsibility (e.g. for the CEO, it might include corporate strategy, executive team leadership, board liaison and understanding customer requirements). You don't want people to get too bogged down in the detail, so recommend that they limit their list to, say, five dot points each• While everyone is writing their answers, draw a two-column table (with a 20%/80% width split) on the whiteboard with the column headings "Who" and "What". Then write each person's name down the left-hand column• Allow 5 min maximum for everyone to have more or less completed their list and then ask each person to read out their list and invite others to ask questions• As they do this, write each person's response up on the whiteboard in the corresponding row in the right-hand column of the table• This agenda item is straightforward and doesn't require extensive discussion. Once the team agrees that the output on the board is at least 80% correct, take a photo of it and move on to the next agenda item

8. How do we behave?

Purpose	Identify the organisation's values, which define the essence of the organisation's culture and way of working
Output	A draft set of organisational values
Start	13:15
Duration	1.5 hr
	<ul style="list-style-type: none"> • Have each person take a blank piece of paper, turn it on its side into landscape orientation and divide it into three columns, using three of Lencioni's categories of values as headings: 'Core values', 'Aspirational values' and 'Permission to play values' • Explain the difference between the three categories to everyone, giving everyone time to ask questions and properly understand the distinction between them. At a high level: <ul style="list-style-type: none"> ○ <i>Core values</i> are the few values that lie at the heart of an organisation's identity and are in place already. These are part of what makes the organisation unique from its peers ○ <i>Aspirational values</i> are those that an organisation aspires to have (but doesn't yet have), because it believes that they're essential to its future success ○ <i>Permission to play values</i> are minimum behavioural standards that are expected of everyone (e.g. honesty, integrity, respect etc.), but which don't uniquely define the organisation • Give everyone 10 min to work individually and try to identify their top three values beneath each of the three categories (i.e. nine values in total) • For the core values, ask everyone to reflect on what values the organisation already demonstrates and which positively differentiate it from most other organisations i.e. what is it about the way we behave that sets our organisation apart from a typical one? Prompt people to think about their experience in other organisations and what they really notice that's different about this one, or perhaps what new starters tend to observe about the organisation • For the aspirational values, have everyone reflect on the clarified why, how and what, and think about what new values the organisational will need to internalise to succeed in the future • For the permission to play values, ask everyone to think about the non-negotiable standards of behaviour that the organisation expects of its people, but which don't really differentiate it from any other organisation (e.g. honesty, integrity, respect etc.) • While everyone is working on their list, setup three pieces of butcher's paper on the wall next to each other, and title one of them with each of the following: core values, aspirational values and permission to play values

- After 10 min, bring the group's attention back to the front of the room and, starting with core values, have each person read out their list of three values and write them up on the whiteboard. If there are any duplicates, just place an asterisk next to the one that is already there. Likewise, if you feel that someone is suggesting one that is very similar to an existing one (e.g. if someone says 'honesty' and then someone else says 'always tell the truth'), edit them into a single value and mark with an asterisk. Finally, if anyone frames their response in the negative (e.g. 'no lies'), try and reframe it in the positive (e.g. 'always tell the truth') without losing the intent
- When everyone has their responses up on the board, invite input from the team and see if you can combine or clarify the list any further. Also check with the group and yourself that the listed values are fitting for that category (e.g. if you're working on permission to play values and someone has nominated 'go for leading edge innovation in everything we do', it would depend on the organisation, but it probably doesn't fit) and park any that don't fit in the more appropriate category
- Assuming you have a list of more than three values on the board, facilitate a discussion about which are most representative or important for the organisation, ensuring that everyone has an opportunity to be heard. Encourage people to argue their views and debate the merit of the respective values with one another - this is important for building commitment, because - as Patrick Lencioni says - *"people need to weigh in before they can buy in"*
- After a reasonable amount of discussion, hand each person a whiteboard marker and then ask them to approach the board and place three ticks against what they judge to be the three most important core values
- Take the three top ranked values (if there is a tie for third, ask the leader to make a tentative decision on the spot) and write them up on the piece of butcher's paper that you prepared earlier. Take a photo of the whiteboard and wipe it clean
- Repeat this final part of the process for the aspirational values and, finally, the permission to play values
- At the end of this session, you will have identified three values in each of the three categories and written them up on pieces of butcher's paper on the wall

9. What is most important, right now?

Purpose	Identify the organisation's key objectives
Output	A small set of priority and standard operating objectives
Start	15:00
Duration	1.5 hr
	<ul style="list-style-type: none"> • Have everyone take a blank piece of paper, turn it into landscape orientation and divide it into two columns titled 'Priority objectives' and 'Standard operating objectives'. Do the same on the whiteboard. • Under the heading of priority objectives, ask people to think about and write down what they believe to be the top three priorities for the organisation over the next 12 months. These should be temporary in nature (i.e. things that can be tackled and finished) and represent challenges to be overcome, improvements or projects, along the lines 'Continue to build a world class team', 'Grow our customer base', 'Increase profit', 'Deliver the new production plant', 'Implement the new ERP system' • Under the heading of standard operating objectives, ask everyone to think about and write down the top three to five measures of the organisation's ongoing success. This should be enduring objectives that reflect the organisation's business as usual, ongoing, day in day out delivery of its <i>why</i> (i.e. its core purpose/mission). These are enduring and won't change over time, and they're not finite projects that can be started and finished. Examples would likely include things like financial performance, customer satisfaction, employee engagement, safety, customer pipeline etc. • After 10 or 15 min and when people appear to be slowing down a little, ask each person to read out their priority and standard operating objectives and write them up in the corresponding column on the board. As you go, look for obvious opportunities to combine similar suggestions, to keep the list as short and tidy as possible. • Be aware that the distinction between what's a priority objective (i.e. a singular, temporary initiative) and a standard operating objective (business as usual, enduring objectives) will likely be confusing for people in the first instance, so you may need to guide people to reshape and/or allocate objectives into the most appropriate format and/or column • There may also be an overlap between the priority objectives and the standard operating objectives. For example, while financial performance will be a standard operating objective for most organisations, there may be occasions when there's a focussed push (reflected in a priority objective) to, for example, 'reduce costs'. This isn't necessarily a problem, provided they've been

defined correctly, and the priority objective is in fact an initiative or project that will start and finish

- Once you have everyone's objectives up on the board and in the correct column, and all the similar ideas consolidated, start with a discussion on the priority objectives. We recommend that you help the team reduce these to three to five objectives that reflect what's most important for the organisation over the coming 12 months. Invite people to advocate for why they believe each of the nominated priorities is most important now and encourage the team to vigorously explore and debate what's most important for the organisation
- A mistake many teams make at this point is to keep going until consensus can be reached. Instead we recommend continuing the discussion for up to, say, 45 min and then drawing it to a conclusion. If the team has reached a pretty clear consensus on the top priorities, great. If not, call time on the discussion and suggest that the decision on the top priorities now rests with the leader. If he or she is happy to make that call on the spot, ask him or her to do so and articulate the reasons behind his or her decision. Write the agreed three to five priority objectives on a fresh sheet of butcher's paper and stick it on the wall. If the leader feels they need more time to decide, capture the action on the actions sheet and agree a reasonable timeframe for him or her to make a decision and articulate the reasons behind it to the rest of the team (this really should be within a few days, to keep things moving forward)
- Repeat the same process with the standard operating objectives, facilitating a discussion and consolidation down to a maximum of five objectives. Standard operating objectives are usually more straightforward, so we recommend only allowing 20 min of discussion on them at this point. Again, if the team can land on a set of standard operating objectives (either through consensus or the leader deciding), write them up on a fresh piece of butcher's paper and stick them on the wall
- Take a photo of the whiteboard for future reference, especially if the leader is yet to decide on either or both sets of objectives
- We recommend that, after the workshop, further work is done on the priority and standard operating objectives, to develop them into two sets of objectives and key results (or OKRs, which you can [read about here](#)). This doesn't need to be done by the team as a whole, but can be developed by the leader or his or her delegate and circulated for later comment. To build on the momentum of the workshop, it's good to get these drafted up and circulated in under a week. Capture this as an action on the actions sheet

10. Wrap up

Purpose	Reflect on the day's outputs, to celebrate the team's work and cement alignment amongst them
Output	N/A
Start	16:30
Duration	30 min
	<ul style="list-style-type: none"> • Give the team a quick five-minute break to pack their stuff up and go to the bathroom, while you arrange the day's outputs on the wall • Starting with <i>why</i> and working left to right, arrange the various pieces of butcher's paper that answer each of the six questions along a section of wall in the order that the questions were tackled throughout the day • Spend a couple of minutes yourself quietly revisiting the answers to each question and thinking about how you can best present them as a coherent story to the team • Frame the first three using Simon Sinek's golden circle model (why, how and what), and then move through the final three questions • When you're ready, ask each team member to grab their copy of the Team Alignment Canvas and stand with you next to the <i>why</i> butcher's paper • Spend 15 to 20 min walking through the answers to each question, linking them to each section of the Team Alignment Canvas. As you go, allow space for people to ask questions - this reflection process is an essential part of creating a shared sense of clarity amongst the team on the organisation's strategic position • After you've been through the answers to each of the six questions, move on and recap on both the actions and parking lot sheets, ensuring the identified actions have been allocated to one responsible person and a deadline agreed • Finally, thank everyone for their time and active participation :)



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