

14-Step Strategy Workshop Planning Guide

- 1. Familiarize yourself with the business
- 2. Discuss objectives and expectations with the business leader
- 3. Review meeting objectives, expectations, participants, and strategic context
- 4. Draft workshop concept and agenda
- 5. Discuss workshop proposal incl. concept, agenda, cost, and support needed with business leader and seek endorsement
- 6. Collect and analyze data for insights
- 7. Set up meeting logistics
- 8. Send out meeting invitations
- 9. Prepare workshop materials, visual aids, flip charts, facilitation tools, and discussion questions
- 10. Get to know key meeting participants up front
- 11. Discuss insights from data analysis and open questions with the business leader
- 12. Visit workshop venue and familiarize yourself with the facilities
- 13. Review workshop concept once more
- 14. Relax.

