Sample Strategic Review and Planning Session Agenda

Session Deliverables:

- Celebrate our successes and understand our challenges in accomplishing this year's objectives - so that we can use these learnings in planning for the future.
- Given those learnings and with a view to the broader organization and the external environment, reach agreement on our highest priority areas for the coming fiscal year.
- For each priority area, determine what success looks like on 12/31/20 and how we will measure it.
- Develop an action plan with clear milestones, due dates, and accountabilities.

Participant Preparation:

To ensure we are fully prepared for productive discussion and tangible outcomes, please think about and come prepared to share your thoughts on...

- 1-2 team successes that you are especially proud of.
- 1-2 areas/initiatives that have not been as successful.
- Lessons learned from both the successes and those that were not as successful that can inform our planning for the coming fiscal year.
- Your preliminary ideas for priority areas and strategic initiatives for 2020.

WHEN	WHAT
90 minutes	❖ Review session deliverables, agenda, and ground rules. ❖ Learn from our successes and opportunity areas.
90 minutes	❖ Identify highest priority areas for 2020. ❖ Gain alignment on what success looks like on 12/31/20 for each priority area.
60 minutes	*Lunch Break*
120 minutes	❖ Determine objectives/KPI's and key strategic initiatives for each priority area. ❖ Develop one-year action plan with major milestones, due dates, and accountabilities.
60 minutes	❖ Reach agreement on processes for monitoring progress and course correcting. ❖ Confirm commitments and next steps. ❖ Share highlights and key learnings from the day.

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