

GOODFRIEND SUCCESS STORY

Strategic Planning Offsite

Challenge

Strategic planning offsite for 25 leaders of a healthcare organization. Successful offsite with another facilitator the previous year. Build upon previous year's retreat to build a clearer roadmap to the 5-year goal and strategic initiatives that would be better aligned to the long term goal and the current operating strategy.

Consulting

Proposed a one-page strategy document framework that focused on the following:

- 5-year goal
- Current marketplace differentiation strategy
- Growth milestones and drivers
- Growth challenges to overcome
- Must-win battles for 2013

As part of this two-day offsite and the alignment of initiatives to the 5-year goal and current year objectives, the facilitation included a process for debating the opposing views of what the 2013 Top 5 initiatives should be. The facilitation process included:

- Cross-functional breakout groups to brainstorm Top 5 initiatives
- Breakout group report out to the large group and developing one list of possible initiatives
- Cross-functional breakout groups discuss their position (pro or con) on each of the initiatives including their debater for that initiative
- Time for pro and con debaters to make their case to the large group as to whether the initiative should be included in the Top 5
- Participants polled on their "vote" for Top 5 Initiatives
- CEO, CFO and COO make decision on Top 5 Initiatives for 2013 based on debate and poll

Outcomes

Much clearer focus on the long term plan and the current year milestones. Debate process was very successful. One participant described it this way, *"gave you an opportunity to say what you wanted to say, you were heard and it helped us connect to the initiatives."*

