

AGENDA FOR BUSINESS PLANNING MEETING

Are you planning a one day strategic planning session with your team? Use this sample agenda for examples on how to run and structure the strategic planning.

Use the prepared agenda to lead the attendees through the actual planning meeting. A planning agenda provides an outline for the planning meeting, communicates important information, can be used as a checklist to identify the information that is covered, and provides more focus on the goals and objectives of the planning meeting. It is a dynamic process demanding constant evaluation and regular refinement based on lessons learned in the marketplace. Provide ample time so your team is prepared with their thoughts regarding each item on the agenda.

Strategy Execution Implementing the actions described and establishing measures of progress and financial targets are key to what is described as the execution process. Identify the information or project that the meeting attendee will plan.

Story so far An opportunity to review highlights of the past 3 to 5 years

The picture now An overview of current services and structures

Major issues facing each program or service

Issues and challenges Identifying and exploring the major issues and challenges: For each program or service including management and administration

For the organisation as a whole including management and administration

Action plan for issues and challenges

What needs to be achieved? A planning agenda is a list of scheduled activities or items to be discussed in a planning meeting.

Conference Planning Agenda. The tips provided below are the compilation of best practices from financial advisory teams we work with. With experience, you can develop into a critical thinker and great strategist. Include the people involved, the date, time, and place of the planning meeting. Writing an agenda for a planning meeting is as hard as it looks. While all of those topics have merit at the right time, the application of this template-type process yields little meaningful strategy content. Growth is not a strategy. Like most activities in life, the more thorough the planning, the better the outcome. Many firms relegate strategy work to an occasional off-site or planning session. Seek input from team members and ask for suggested agenda items. Send the agenda several days, or weeks, before the meeting if the attendees need to complete extensive research in order to prepare for the meeting. It is used to define and prioritize the investments needed to carry out a plan. Provide an agenda and a clearly-defined three to five year vision of your firm to all attendees. It is anticipated that all the major issues and challenges will be able to be named before lunch. It highlights important information and helps attendees determine their roles and responsibilities within the meeting. Your agenda will be based on the amount of time you allow for your strategic session and should include each of the items listed in the sample agenda below. Ask each team member to prepare an overview of department strengths and weaknesses from the prior year along with the top three to five proposed initiatives for the next year. Interdependent issues are ones in which individuals must coordinate their actions with the rest of the group.