



DIVERSITY AND INCLUSION

Planning Team Guide



TOOLKIT

What is team strategy planning?

Team strategy planning is the process of coming together as a group to create priorities and goals for your organization. Team strategy planning also involves determining how to allocate your resources and energy when it comes to various projects. When meeting as a team for strategy planning, there are various objectives you may aim to achieve.

How to develop a strategic plan as a team?

Follow these steps when it's time for your team to start strategic planning:

1. Define the purpose of your plan

When starting a strategic planning session with your team, make sure you define the purpose of the process. Make it clear what goals and objectives your team needs to work toward. When creating an outline of your plan, make sure your team fully understands the scope of the work they are doing. Make sure everyone is aware of any important timelines or due dates.

2. Expect multiple planning sessions

Rather than trying to fit everything into one planning session, break it up into multiple meetings. It's likely that you'll start off with an initial brainstorming session and then later meet to discuss any ideas your team agrees to move forward with. Make sure to give your team members plenty of notices about upcoming meetings so that they can plan accordingly. Set expectations for each meeting so everyone comes prepared with what they need to make a meeting successful.

3. Create roles for each person

Instead of having everyone do a little bit of everything, assign roles to each person on your team. This way, everyone is aware of responsibilities and takes accountability for their work.

Leader: This is the person who is in charge of leading all of your team's strategic planning sessions. They need to be highly organized, ensuring that the team is meeting its goals and deadlines. This individual makes sure group discussions run efficiently and that everyone has a turn to speak.

Note taker: This person is responsible for writing down all of the important talking points in each meeting. After everyone meets, they are in charge of writing up detailed meeting notes and sending them to each participant. We recommend sharing these in a common space, such as SharePoint or an appropriate shared virtual space.

4. Create space and an environment for all

In order to create an effective strategic plan, everyone must be provided an opportunity to share, speak, and contribute. One way to help people share their ideas is by having break-out sessions where people can share their ideas in smaller groups or with a partner.

Encourage people to prepare some talking points in advance so they have something to share. Of course, spontaneous discussion can also be quite helpful in the planning process. Overall, it's helpful to ask if anyone has more to share at the end of a meeting.

5. Create a plan of action

Once all members understand their roles and responsibilities, it's time to put your plan into action. Make it clear what everyone needs to do moving forward. Consider having check-in meetings to discuss progress. As you implement your plan, be willing to adjust to ensure goals are met.

Adapted from [Indeed Career Guide](#) (2021)