

Monarch Planning Session Agenda

**Planning Meeting Agenda**

**8:00 AM: Introduction and Warm Ups**

**Objectives for the Planning Session: Facilitator Bill A.**

* What do we want to leave here with? Group Review
* Questionnaire Says: Review Employee Questionnaire

**Rules of Engagement: Facilitator Bill A.**

* Open Dialogue- Spirit of Inquiry
* Dos and Don’ts
* Parking Lot

**9:30 AM – 9:45 AM Break**

**9:45 AM - 11:00 AM “Here” to There” Facilitator Bill**

**Where are we now? (Current Reality) Team Review**

* Key indicators: How do we measure success? How do we measure up?
* Current program implementation status

**Where do we want to be in 3 years? (Desired Destiny)**

* Review of Mission, Vision, Values, Strategic Intent
* What does there look like? Revenue, Market Types, People

**11:00 AM - 12:00 PM**

**Monarch SWOTT: Facilitator Bill A.**

**We will SWOTT ourselves and our competition!**

* Strengths: Good Now; Maintain, Build
* Weaknesses: Bad Now; Remedy, Stop
* Opportunities: Good Future: Plan, Prioritize
* Threats- Bad Future: Counter, Minimize
* Trends: What are the trends with customers, the competition, overall environmental scan

**Success Map: Facilitator Bill A.**

* Map out all the success areas and use these to help prioritize
* Decide on Top 3 major initiatives- issues to focus on for 2016
* Build list of the Top 5-10 minor areas to be addressed and remedied

**Prioritize areas to work on in 2016 and beyond: Team Review**

* Establish milestones and goals
* Best Practices: Which ones will we focus on developing and or implementing?
* Determine levels of priority, assign champions
* What to work on and in what order?

**12:00 - 1:00 Lunch**

**1:00 – 3:00 Action Steps**

* Team Reports with Timelines – Objectives
* Next Steps

How will we know if we are making progress?

How will we stay on plan and how often will we review our progress?

* Planning Debrief