

# Team-Based Strategic Planning



## Participant Manual

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# Team-based Strategic Planning

*A Step-by-Step Process*

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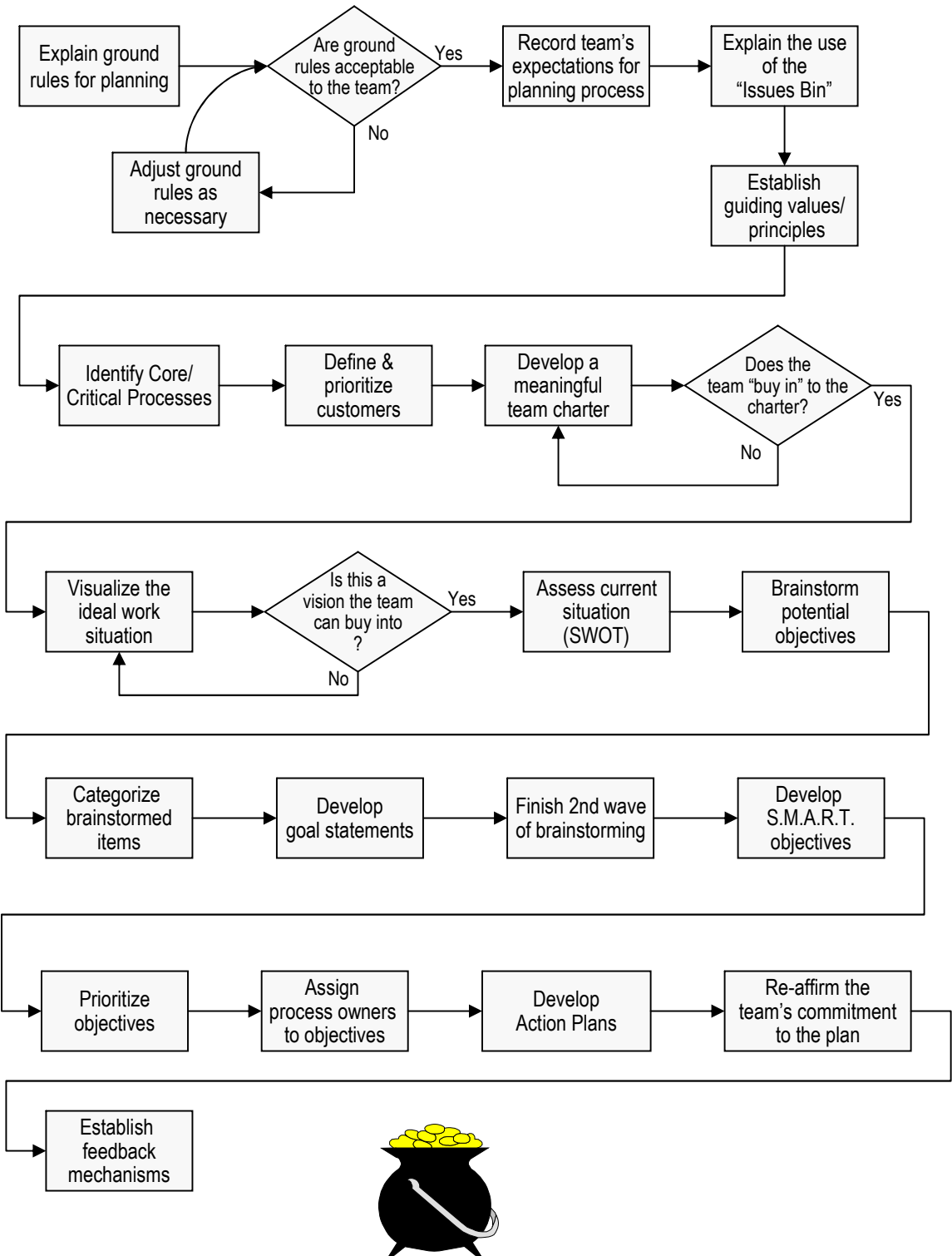
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## The Planning Process



The strategic planning process that you are about to embark upon is designed to help you and your fellow teammates to create a meaningful plan and to further develop your team. Below, you will find an outline of the strategic planning process.

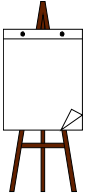


## Ground Rules

As we begin the strategic planning process, it helps to have a set of ground rules and guiding principles to help us keep our efforts on track. A good set of rules to begin with includes:

Explain ground rules for planning

Time: 10 Minutes



- This is a safe zone
- Everyone participates, no one dominates
- Help us stay on track
- Listen as a friend
- One speaker at a time
- Be an active listener
- Agree only if it makes sense to do so
- Keep an open mind
- Maintain confidentiality
- Agree not to do perfect work
- Have fun!



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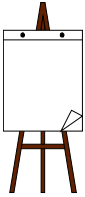




## Guiding Values & Principles

Establish  
guiding values/  
principles

Time: 15 Minutes



Below, you will see a list of guiding values and principles. Your team will need to decide if you can “buy-in” to these. You and your team members may also want to add a few of your own.

**Leadership...** We will be a world-class leader in every aspect of our business: developing our team leadership skills at every level; in our management performance; in the way we design, build and support our products; and in our financial results.

**Integrity...** We will always take the high road by practicing the highest ethical standards and by honoring our commitments. We will take personal responsibility for our actions, and treat everyone fairly and with trust and respect.

**Quality...** We will strive for continuous quality improvement in all that we do, so that we will rank among the world’s premier industrial firms in customer, employee and community satisfaction.

**Customer Satisfaction...** Satisfied customers are essential to our success. We will achieve total customer satisfaction by understanding what the customer wants and delivering it flawlessly.

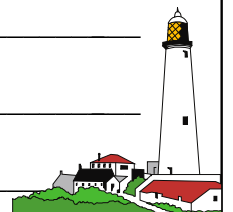
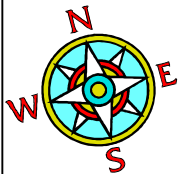
**People Working Together...** We recognize our strength and our competitive advantage is - and always will be - our people. We will continually learn, and share ideas and knowledge. We will encourage cooperative efforts at every level and across all activities in our company.

**A Diverse and Involved Team...** We value the skills, strengths, and perspectives of our diverse team. We will encourage a participatory workplace that enables people to get involved in making decision about their work that advance our common business objectives.

**Good Corporate Citizenship...** We will provide a safe workplace and protect the environment. We will promote health and well being of Boeing people and their families. We will work with our communities by volunteering and financially supporting education and other worthy causes.

**Enhancing Shareholder Value...** Our business must produce a profit, and we must generate superior returns on assets entrusted to us by our shareholders. We will ensure our success by satisfying our customers and increasing shareholder value.

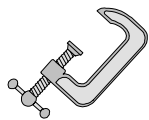
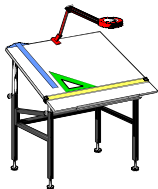
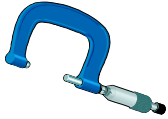
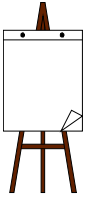
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## Core (Critical) Processes

Identify Core/  
Critical Processes

Time: 15 Minutes



Core processes, sometimes known as “critical processes” are the basic functions that your team is responsible for. Though it may be obvious to some team members, it is helpful to understand what your core/critical processes are, as well as identifying those that your team is not responsible for.

Our Core/Critical Processes Include:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Our Core/Critical Processes **Do Not** Include:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

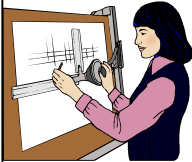
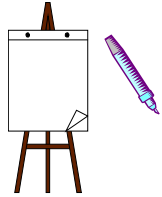


## Customer Definition and Prioritization

Define and  
Prioritize  
Customers

In the space below, write down the names of the people or departments that you believe are the customers of the products or services that your team produces.

Time: 30 Minutes



### Initial Customer List:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

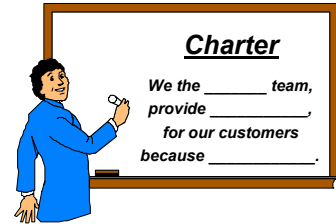
### Prioritized Customer List:

1. _____	7. _____
2. _____	8. _____
3. _____	9. _____
4. _____	10. _____
5. _____	11. _____
6. _____	12. _____

## The Team Charter

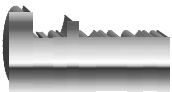
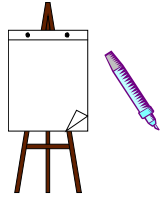
Your team's charter (or mission statement) should reflect the following:

- Who the team is
- What the team does
- Who the team does it for
- Why the team does what it does



Develop a meaningful team charter

Time: 60 Minutes

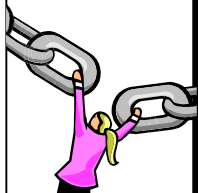


Service

Safety

Value

Speed



Below, write a **draft** charter (or mission statement) for your team.

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In this space, you will write your team's **finalized** team charter

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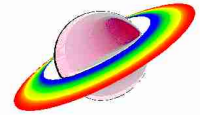
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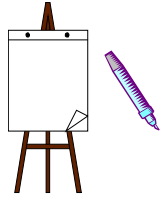
## The Team Vision



Develop a meaningful team charter

Imagine a place where you really enjoyed working, free of problems, frustrations and other irritants. Imagine a place where you can be proud of a job well done. What would it look like? How might you visualize your ideal situation?

Time: 60 Minutes



Below, capture some of your thoughts of an ideal work place.

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In this space, you will capture your team's vision for the future.

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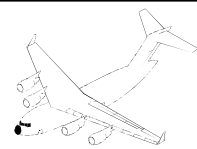
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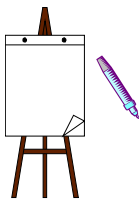


## Assess The Current Situation (S.W.O.T.)

Assess Current Situation (S.W.O.T.)

In the spaces below, think about your team and your operating environment. What are your team's internal strengths & weaknesses? What are the opportunities and threats that are external to your team?

Time: 30 Minutes



**Strengths**  
(Internal)



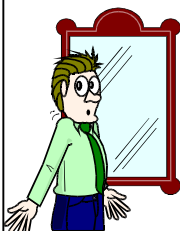
**Weaknesses**  
(Internal)



**Opportunities**  
(External)



**Threats**  
(External)



## Brainstorm Potential Objectives

Brainstorm  
potential  
objectives

Time: 30 Minutes



Now that you understand why your team exists (team charter) and where you would like to see your team in the future (team vision), it is time to figure out what it is going to take for your team to get there. With the post-it notes provided, try to answer the questions below:

- What does our team need to do more of or stop doing completely?
- What processes within our team are currently out of control or in need of improvement?
- How can we better serve our customers?
- What do we need to do to achieve our vision?



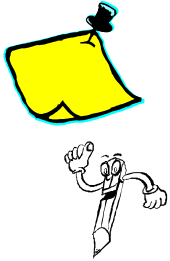
## Team Goals



Brainstorm potential objectives

Now that your team has brainstormed some action items, see if you can agree on distinct categories or groupings. What are the categories your team came up with?

Time: 30 Minutes



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Develop goal statements

In the space below, you will write out your team's finalized goals:



Time: 30 Minutes



1. \_\_\_\_\_

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2. \_\_\_\_\_

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3. \_\_\_\_\_

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4. \_\_\_\_\_

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5. \_\_\_\_\_

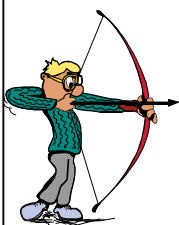
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6. \_\_\_\_\_

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7. \_\_\_\_\_

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## Develop S.M.A.R.T. Objectives

Conduct 2nd wave  
of brainstorming

Time: 30 Minutes



Now that your team's goal statements are in place, it is time to focus your ideas and to try to make them as S.M.A.R.T. as possible. This means ideas should be:

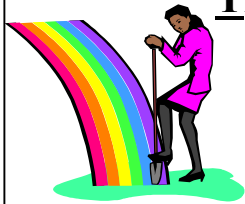
**Specific:** Ideas should not be vague or general

**Measurable:** Ideas should be quantified or qualified in some way

**Achievable:** Ideas should be within the team's circle of influence

**Results-Oriented:** You should be able to visualize what the success of the idea will look like.

**Time-Dimensioned:** You should be able to set a reasonable deadline for action (measured in days or weeks, NOT years).



You may want to capture some additional ideas here:



## Prioritized Objectives



Prioritize objectives

The team will create a list of prioritized objectives to be posted in your work area. Below, capture the objectives you are responsible for (or concerned about).

Assign process owners to objectives

Objective:

Process Owner(s)

Expected Completion Date

Time: 60 Minutes



I don't know where to start!





## Action Planning

Select an objective and begin action planning with the template below.

Action  
Planning

Time: 30 Minutes



Goal: \_\_\_\_\_

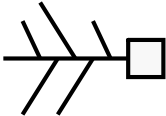
Objective: \_\_\_\_\_  
\_\_\_\_\_

Problem Statement: \_\_\_\_\_  
\_\_\_\_\_

Names of other people who will assist you in solving the problem:



Possible Root Causes:



Macro steps in the process. *Use other side of paper if necessary:*



How you will measure your success:



Expected Completion Date:

Next steps:



## Action Planning

Select an objective and begin action planning with the template below.

Action  
Planning

Time: 30 Minutes



Goal: \_\_\_\_\_

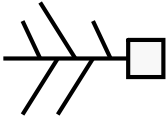
Objective: \_\_\_\_\_

Problem Statement: \_\_\_\_\_

Names of other people who will assist you in solving the problem:



Possible Root Causes:



Macro steps in the process. *Use other side of paper if necessary:*



How you will measure your success:



Expected Completion Date:

Next steps:



## Action Planning

Select an objective and begin action planning with the template below.

Action  
Planning

Time: 30 Minutes

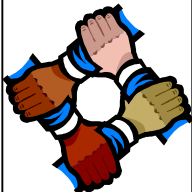


Goal: \_\_\_\_\_

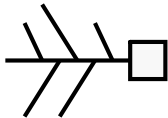
Objective: \_\_\_\_\_

Problem Statement: \_\_\_\_\_

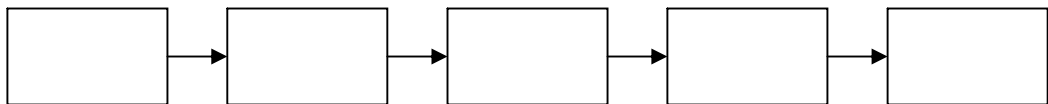
Names of other people who will assist you in solving the problem:



Possible Root Causes:



Macro steps in the process. *Use other side of paper if necessary:*



How you will measure your success:



Expected Completion Date:

Next steps:



