

STRATEGIC PLANNING

Preparing and Leading the Planning Process

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EXECUTIVE SUMMARY: *The key to success in most endeavors requires the right preparation, execution, and follow-through. In this bonus chapter accompanying Scaling Up (Rockefeller Habits 2.0), we share a dozen key steps to prepare the team for a quarterly or annual planning session; suggested agendas; and recommended follow-through after the offsite meetings. And at the back of this chapter is a sample completed One-Page Strategic Plan.*

Preparation:

- 1. Set Dates:** It's advisable to set the dates for the quarterly and annual planning retreats (some people call them "advances") well in advance. And it's best if a specific rhythm is established (i.e., the second Friday and Saturday before the end of the quarter). The annual planning session is normally two to three days and the quarterly sessions one to two days. Specific agendas are detailed below.
- 2. Scan *Scaling Up*:** Have the executive team scan *Scaling Up (Rockefeller Habits 2.0)*, especially the three chapters in the Strategy section and The Priority chapter in the Execution section. The book is available on Amazon.com or you can save some money and order in bulk (20 to a box) at www.scalingup.com.
- 3. Complete 4D Assessment (optional):** Have the executive team take 5 to 10 minutes to complete the 4D assessment to see which of the Four Decisions — People, Strategy, Execution, or Cash — needs the most attention in the upcoming planning session. [Click here to start your assessment now.](#)
- 4. Read Collins' Articles:** Read (and re-read) Jim Collins' *Harvard Business Review* article titled "Building a Company Vision." (Download for \$6 at www.hbr.com). Do this in the first few annual planning sessions until you're comfortable with your Core Values, Purpose, Profit/X, and BHAG — key elements of the first two columns of the One-Page Strategic Plan (OPSP). Also go to www.jimcollins.com where Collins has several free interactive tutorials to help discover Core Values, discern a Purpose, choose a BHAG, etc.