GUIDE TO

REMOTE STRATEGIC PLANNING

“Success is 20% skills and 80% strategy. You might know how to succeed, but more importantly, what’s your plan to succeed?”
- Jim Rohn

Strategic planning forms the backbone of your organization’s activities. It’s a time to refocus on your long-term vision and set the tone for what your company needs to prioritize. With the world drastically disrupted by COVID-19, effective planning is more important than ever.

But how can companies plan for success when workers are remote and nothing feels normal? After working with numerous organizations to transition their planning sessions to be fully remote, and transitioning our own planning, Align has plenty of tips for how your company can strategically plan when unable to gather in person. Let’s dive in!

What are the critical components of any planning session?

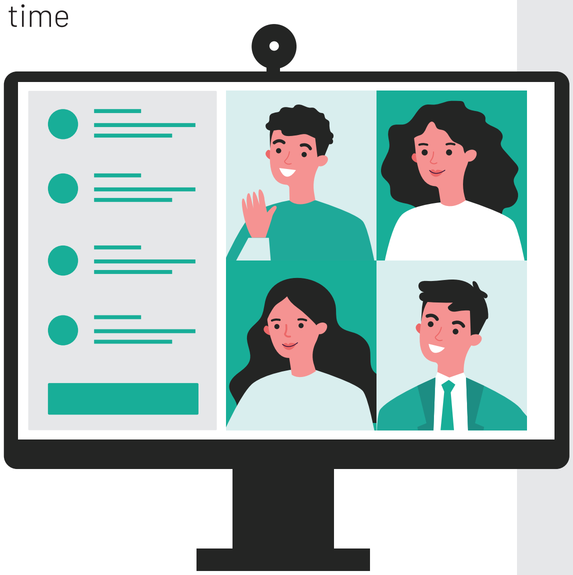
After establishing ground rules and energizing the team with an icebreaker, every planning session should begin with a look back at the past period to evaluate what was achieved and which goals were not met. For many companies, 2020 was likely one of the most hectic and unusual years the company has ever faced. The road ahead should be guided by what you have done in the past, while also considering the “new normal” established by COVID-19. Things may be drastically different for your business landscape, so take in account what old practices may not work anymore. “How can we adapt strategy to the changing world?” must become the central question for every planning session during this time.

The main focus of quarterly planning sessions is setting priorities, the large company goals that move the business forward. Those company priorities set the stage for all of our other goals and tasks. Every day of work should hold value in helping your company reach your Big Hairy Audacious Goal, the defining grand vision for your company created by Jim Collins in *Built to Last*. Company priorities serve as connective tissue between your long-term goals and your current day-to-day tasks. Planning quarterly goals tied to annual targets helps you make focused progress toward your vision consistently and efficiently.

Basic tips for successful video conferencing

Remote meetings were the biggest new trend in 2020. As planning sessions require more time, people, and collaborations than typical virtual meetings, a solid agenda and tech is critical for maintaining efficiency. Companies should clearly lay out what planning entails and ensure all team members will be fully focused on the task at hand.

- Have a prepared agenda with planned out topics and allotted time
- Have a designated conversation leader
- Encourage everyone to speak and share thoughts
- Save discussions that don't require the entire group for later, don't waste anyone's time
- Ensure all team members have a reason to be there
- Avoid tech issues by familiarizing everyone with the technology beforehand and appointing a moderator
- Stick to your allotted time
- Keep topics moving and interesting



Facilitating a remote planning session

To maximize engagement, everyone in your company should be present and actively participating in discussions about your roadmap moving forward. The best way to organize discussion is to appoint a facilitator, often a coach.

Having an organized agenda is important in any planning session, but it's critical for a virtual one. If no outside coach or consultant is used, someone needs to be a designated leader to help organize and steer the planning session in the proper direction. When communicating over a video chat, conversation is slowed somewhat as everyone takes turns to give their input. If someone is present to facilitate discussion, you can avoid a conversation going on longer than it should, or getting too far off topic. Your planning session is a focused conversation, not a wide open brainstorm.

For more tips on a standard, pre-COVID planning session, check out what tips Petra Coach Jennifer Faught has for running a strategic planning session.

Asking the important questions

As you've heard a million times since the Spring, this is an uncertain time for businesses. By this point, most companies have enough data to pause and look back at how your company has handled the disruption. When you initially encountered the disruption, did your company freeze spending in some areas? Did you halt some business practices or production? Is now the right time to undo those moves and revert back to some practices? Now that you've survived the initial disruption, evaluate your current position and figure out what steps you can take, if any, to recapture or accelerate your growth. Everyone in the company needs to be on the same page about what they're going to do moving forward and lengthy discussions need to be held about why these are the right choices.

10 questions to guide your planning:

- **How has the COVID-19 disruption affected our business operations?**
- **Are our BHAG, values, and core customer still relevant?**
- **How does our core purpose apply to the challenges our customers face during this time?**
- **What will drive growth even in a time of fear?**
- **What are our competitors doing to address disruption?**
- **What are the biggest risks to our business of prolonged economic downturn?**
- **Have we selected the right KPIs and targets as leading indicators of performance?**
- **Are individual priorities aligned to company priorities?**
- **Have we clearly defined success and set up progress tracking?**
- **What blind spots do we have to risks and opportunities and how can we gain line of sight into them?**

Case study: virtual planning at Align

Align held two remote planning sessions during the COVID-19 disruption. The first one, held in late March, happened right when the pandemic was beginning, and there was more uncertainty than anything. Align took time during the planning session to consider what, if any, changes need to be made during the disruption to improve our workflow and usefulness to consumers. Several great ideas came out of this, and the team felt more confident by the end of it.

Our second planning session was held in late June, and evaluated the things we did differently during the disruption. We found that we greatly exceeded some priorities, but fell short in others. This was expected due to an uncertain three months, but we tried to gather whatever feedback we could from those victories and misses. By this point, we had survived the initial scare and uncertainty. It was time to start growing again.

Both planning sessions still consisted of revisiting our values and visions and setting priorities, things that are done every planning session. But it was important to remember the quarter we were planning for would be different than most. Setting aggressive, but realistic goals, during a pandemic challenges your team. But acknowledging the uncertainty of hitting them and the possibility of revising and improving them as you go along sets your team up as success. Failure to hit your past period's priorities should not be seen as a failing report card, but as a guide to what may and may not work in the coming months.

Keeping planning session fun and engaging

Running a fun and engaging planning session is a challenge when sessions last an entire workday. Your team needs to be energized and engaged, but not distracted or lackadaisical. Team exercises at the beginning of the session are important to establish the meeting's tone. Discussing topics like how your team is handling personal challenges of pandemic life establishes the vulnerability needed to dive into tough topics during planning. Combined with an occasional icebreaker game and frequent breaks (including full stop for lunch), keeping things energized and creative maximizes your output.

Remote planning checklist

Before planning

- ☐ Choose a time that your team can commit to focus
- ☐ Send a survey for feedback on what's working and where improvement is needed
- ☐ Appoint a facilitator (agenda) and moderator (tech)

During planning

- ☐ Set ground rules
- ☐ Conduct an icebreaker/energizer (see icebreaker tools)
- ☐ Look back on last quarter's results
- ☐ Celebrate wins and key players
- ☐ Take breaks (every 60 minutes!)
- ☐ Review your core purpose and BHAG
- ☐ Brainstorm company priorities
- ☐ Group and whiteboard top choices for company priorities
- ☐ Choose 2-3 company priorities
- ☐ Select 3-5 individual priorities based on company priorities
- ☐ Record chosen company priorities in a accessible place (Align works best!)
- ☐ Debrief on how planning went and set expectations for coming quarter

Post planning

- ☐ Record priorities and set up tracking
- ☐ Send a recap survey to gather feedback from the planning session

Tools for remote planning

Hosting tools

Using your regular video conference platform is fine, although ability to breakout rooms is valuable.

NAME	FEATURES	PRICE
Zoom	Breakout rooms	Free with time limit. $149-199/license/year
Microsoft Teams	Whiteboard	Free to $25/user/mo
Webex	Whiteboard and Breakout Rooms	Free (limited) to $27/user/mo
Google Meet		Included with G Suite

Ice breaker tools

Spice up planning beyond simple icebreakers with these fun games to get the creativity flowing.

NAME	FEATURES	PRICE
Kahoot	Create engaging multiple choice trivia games.	Free (with add ons)
Psych	Choose from a variety of fun categories in which each player makes up fake answers to real trivia questions.	Free (with add ons)
Quiplash	Hillarious fill in the blank game	$4.99
QuizBreaker	Automated icebreaker quizes with premade ice breakers and customizable questions	$3/user/mo

Collaboration tools

Use these tools for team collaboration and brainstorming company quarterly goals.

NAME	FEATURES	PRICE
Mural	Platform for product strategy and planning, the facilitation of immersive workshops using agile and design thinking methodologies, sales and consulting engagements, and research and design.	$12/user/mo
Bluescape	Customizable virtual workspaces, whiteboarding, integrated video conferencing	Focused on Enterprise, price by request
Miro	Editable whiteboards and templates	Free (with Premium Options)
Concept Board	Shared virtual workspace	Free (with limits)
Stormboard	Virtual whiteboard	Free (with Premium Options)
Jamboard (Google)	White board and virtual stickies	Included with G Suite

Execution tools

Each business will use different tools to track and monitor their goals. Only Align brings execution data from every department into a central place for monitoring performance against strategic goals. The following is an example of how we track performance on goals at Align.

NAME	FEATURES
Align	Record vision and targets in one page plan, track strategic priorities, monitor real-time KPI dashboard with integrations, see data in your meetings with Huddles.
Hubspot	Monitor marketing activity
Salesforce	Track sales activity and pipeline (Integrates with Align)

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