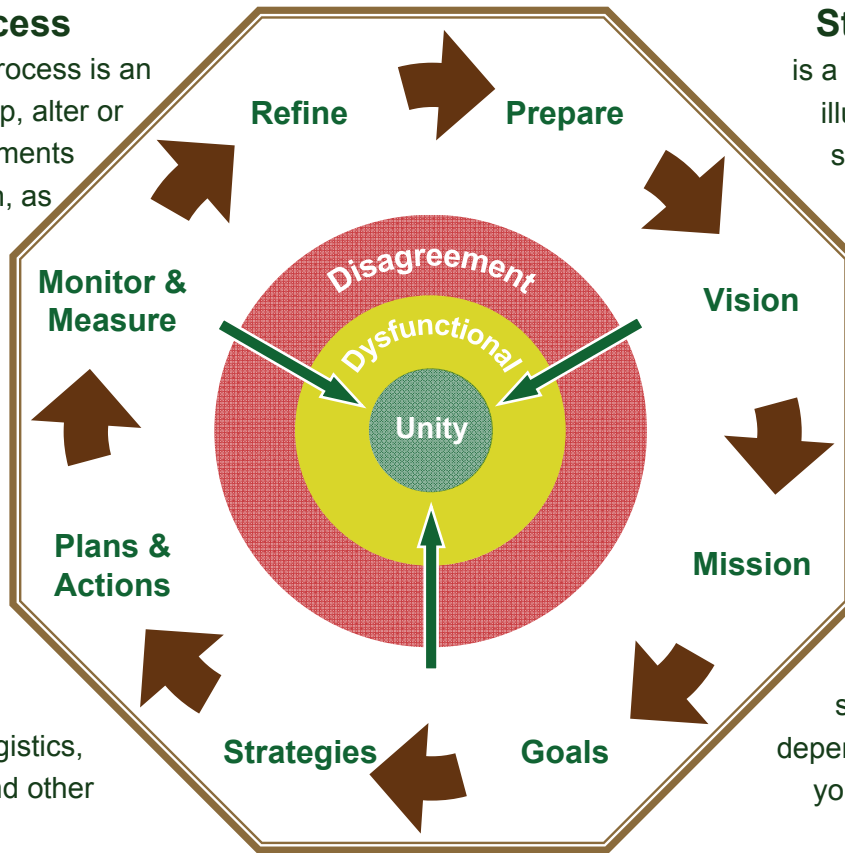


## The Planning Process

The strategic planning process is an intensive effort to develop, alter or confirm fundamental elements of the business' direction, as well as identifying the key processes and action steps to execute the plan. It can take many forms, based on the stage of the business, pace of change, leadership style, prior planning experience, personnel availability, access to specialized expertise, logistics, budgetary constraints and other considerations.



## Strategic sessioning

is a high-impact, effective and illuminating approach to the strategic planning process. LedgerSource's approach to sessioning includes four key stages as described below. They will help ensure that you and your team move forward as one. These sessions can be conducted off-site or at your facilities, and may take place in one holistic event or a series of shorter meetings, depending on the availability of your team and the business' unique cultural factors.

**Benefits:** When you and your team share a common vision and are united in pursuit of the mission, goals and strategies needed to achieve that vision, you will greatly improve the likelihood of seeing it happen. The benefits of planning are broadly recognized. Consider these thoughts on the subject:

### Why Planning is Important?

Those who plan do better than those who do not plan even though they rarely stick to their plan.  
*Winston Churchill*

By failing to prepare, you are preparing to fail.  
*Benjamin Franklin*

It is not the strongest of the species that survive, not the most intelligent, but the one most responsive to change.  
*Charles Darwin*

Forewarned, forearmed; to be prepared is half the victory.  
*Miguel de Cervantes Saavedra*

Where there is no vision, the people perish.  
*Proverbs (29:18)*

In preparing for battle I have always found that plans are useless, but planning is indispensable.  
*Dwight Eisenhower*

# Helping you make confident decisions.

## LedgerSource's Strategic Planning Process

- Preliminary Activities:** we establish the specific agenda of the planning session, and gather background information and resources needed to make sure that you end up with a quality process. This may include such activities as:
  - logistical and program planning for the strategic session;
  - historical analysis of financial and operational results;
  - preliminary information gathering from internal and external sources such as employees, management, board, owners, customers, vendors and other strategic partners; and
  - arranging for specialized market, technology or other presenters if appropriate.
- Facilitated Sessioning:** LedgerSource will conduct your planning session with our trained facilitators. In this case our role is not to provide content expertise, but rather to make sure that your own experts surface, vet and prioritize their ideas. Our personnel are highly experienced business leaders who will be able to quickly understand the business concepts presented and move your team forward. Specialized technology is frequently used to better understand the level of consensus within the group and to immediately surface hidden agendas or inconsistent knowledge.
- Post Session Activities:** We work with you to make sure that the decisions made at the session are captured and actionable.
- Ongoing Monitoring:** Periodic status checks can be helpful to make sure that your team stays on track.

"You got to be careful if you don't know where you're going, because you might not get there".  
~ Yogi Berra

Inherent in our approach are the concepts of preparation, inclusion, divergent thinking (to identify the possibilities), convergent thinking (to assess and prioritize the ideas), and action to execute your choices.

