

# PlanningDay™

Business Planning in a day



DEVELOPING LEADERSHIP AND HIGH PERFORMANCE TEAMS

When you need to get your team together to work effectively through the issues and opportunities at hand in order to arrive at a simple clear and actionable plan, the Coral Sea "PlanningDay" approach is the best way to start.

**Time is short and the pressure is on. You can get your people together for a day at the most and you want the best out of that day. How do you cover the relevant ground and get a good result? Here are some of the answers:**

## Get experienced professional facilitators to assist you

At Coral Sea Consulting we have been helping our clients with their business development needs for over 30 years. We have developed business plans for teams in a wide variety of disciplines and business situations. There is not much that we haven't seen or heard before. We understand the people dynamic and as a neutral party can create a safe environment for discussion and decision making that brings out the best ideas and commitments. We also know what needs to be done to ensure plans are successful in the months and years that follow the planning day.

## Get the right people into the room

It is important to have all key stakeholders and functionaries in the planning discussion. It is best to have the planning discussion and its decision making just once, at the front of the planning and implementation cycle, so that maximum time is available to do the work that follows. Actions based on common understandings can then commence the very next day.

## Get information distribution, lengthy presentations and necessary fact finding out of the way via pre-work exercises

The most beneficial activity on the planning day is group discussion on where you need to go and how you are going to get there. To make as many hours as possible available to this component, it is good to use the week before the planning day to distribute information and provide reading packs that ensure everyone is coming into the discussion prepared and mentally warm to the subject.

## Provide an environment that is fully conducive to concentration and good team thought development

Planning days are typically mentally intensive. Provide a room with natural light, good space and good amenities. Ask everyone to treat the day as an "upside" gathering, where positives are sought and possibilities are savoured. Good plans arise from free, creative and adventurous thinking.

## Provide a process that steps reliably through necessary layers of discussion to the establishment of a plan by the end of the day.

In order to stay on topic, the agenda, process and facilitation must progress steadily across the day. Not all that might desirably be known in order to complete the plan will be known on the day. These things simply become a next step of research and adjustment in the plan. Participants must accept working with what they have at hand and using that to set an initial action plan that will be clarified and improved over time.

## Keep it simple

We find that most clients initially want to "boil the ocean" in the content they think they can cover in a day. It is important to focus on critical path opportunities and issues in order to have the plan well focused, challenging and strong.



## PlanningDay™ structure

Welcome

Scene setting -where are we now (we can offer variable approaches for this)

The imperative for change clarified

Market opportunities and risks clarified (SWOT)

Where we need to be by the end timeframe for our plan – what success looks like

Key deliverables and growth targets.

Stepping back to mid term and near term milestone checkpoints

Our immediate step off projects and action lists

Who does what

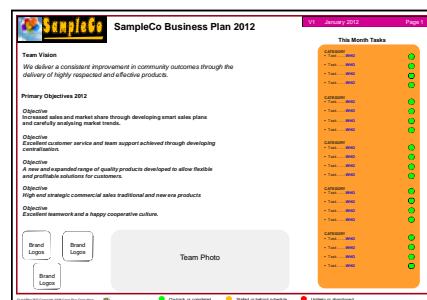
How do we coordinate, report back and manage delivery? ( we have variable processes to support this if needed)

Close

## The Plan Presented

Using simple traditional facilitation techniques the plan grows in a wall chart in front of participants as the day progresses. Following the workshop this wall chart is converted into a simple “plan on a page” pictorial. This becomes the first version of the working plan. The layout of the pictorial can be customised to suit your needs.

The detail of the plan is also dropped into a simple Excel spreadsheet that can be used to maintain a history of progress over time.



## The Implementation Process

Coral Sea Consulting can assist you with advice and facilitation services that will help you implement the plan. Some of our clients only want the day of planning and are happy to then devise their own methods for ensuring work is done and adjustments are made.

If more assistance is needed, we can offer a well proven and structured approach to implementation that is simple and has low overheads. Following initial training and setup this is a DIY process. However, some clients find benefit in maintaining our direct involvement with their teams at checkpoint intervals along the implementation timeline.



## Cost

PlanningDay™ is an inexpensive and cost-effective way to get strong development in your team and your business.

## Our Facilitators

All Coral Sea’s facilitators have extensive experience in business leadership, professional facilitation and training, and conducting business planning workshops. We have managed discussion around wide diversities in topics, with groups from many differing backgrounds. Over many years we have worked closely with a myriad of clients – seeing their plans through to fruition and celebration. We take a pragmatic and flexible approach to designing and facilitating great outcomes for our clients.

## Coral Sea Consulting

30 years helping people develop excellent leadership, and high performance teams

We are: Professional Facilitators, Trainers, and Executive Coaches

PlanningDay™ is a part of a linked set of products and services delivered by Coral Sea Consulting.

