

Strategic Plan Facilitation

Creating an effective and energising strategic planning experience

The strategic planning process means different things to different organisations. But the one constant is the desire to define the direction of future efforts and gain consensus among stakeholders.

Strategic planning is rational *and* emotional

While it's tempting to think strategic planning is a purely rational process focused on facts, figures and logical consideration of options, it's important to recognise it can be an emotional and challenging journey for those who are participating.

Strategic planning facilitation by Stuart Ayling

Stuart is an accomplished facilitator, consultant and workshop leader with over 20 years experience working with a diverse range of executive groups and their teams. He holds a Bachelor of Business (Marketing, University of Western Sydney) and a Graduate Certificate in Management (International Business, University of Queensland).

Stuart Ayling, MIMC is a member of the Institute of Management Consultants and adheres to the association's Code of Conduct and Ethics. He has experience working with leading companies in many industry sectors including:

- Business-to-business products, services and software
- Distributors of industrial products and consumables
- Manufacturers of equipment, industrial goods and food products
- Local government and community services
- Commercial trades services such as electrical contractors
- ICT service providers such as managed services and unified communications
- Education providers such as RTO's and adult education
- Professional services such as consultants, engineers and accountants

Overall the strategic planning sessions were a positive for our business and a lot of that can be put down to Stuart and his ability to plan, manage and record the outcomes from the sessions. A big thank you to Stuart.

ANDREW BELL, CEO
MOUNTAIN BLUE FARMS, NSW

The objective was always clear to create a plan that we could grow with, and at every point of the process we felt the professional guidance provided was focused and relevant to our needs. Importantly, we felt that our time was always very well utilised during the planning meetings.

BRETT HOLDSWORTH, CEO
TPS GROUP, QLD



The Vectis approach to strategic planning

Effective facilitation of the strategic planning process is based on some important underlying principles:

- **Understanding your goals** for the process including the key questions to be answered.
- **Having the right participants**, combining senior decision-makers, key staff and other stakeholders relevant for your organisation, and understanding group dynamics.
- **Reviewing relevant information** in advance such as previous strategy documents, Board minutes, annual report, financial reports or management meeting reports.
- **Preparing an effective agenda** to ensure the main focus remains the main focus.
- **Getting input in advance** of the planning session (or sessions) from a range of stakeholders and collating that for discussion at the session.
- **Using practical analytical frameworks** such as SWOT and PESTEL to stimulate thinking and gain insights.
- **Ensuring all participants have an equal opportunity for input**, without individual personalities taking control.
- **Capturing key outcomes and priorities** with related notes and action points for future follow up or further operational planning.

The strategic planning process is usually a program of work, not a one-off event. Some of the work is done before a group session is held, some is achieved during the session, and other actions are taken afterwards to refine ideas, confirm important concepts, and clarify appropriate next steps. We will work alongside your team providing guidance and support to ensure you achieve an actionable outcome.



Stuart's process to seek an initial planning framework was inspired. Harnessing this knowledge in this way has led to a robust and very practical strategic planning outcome. I strongly recommend Stuart for his facilitation skills, his authenticity, and his subject understanding.

PAUL CLAYTON, CEO
PROTERRA GROUP, QLD

Thanks to Stuart, we built a robust plan with full buy-in from the entire team. He opened up everyone's thought processes, encouraging innovative and strategic thinking. We are now equipped with a clear, actionable plan to achieve our long-term goals.

JOEL BREWER, FINANCE AND OPERATIONS DIRECTOR (ANZ)
QUANEX, NSW