



Guidelines to consider:

- Strategic “Planning” team should consist of 6-8 people.
- Members of the Executive team should be on the Strategic Planning Team.
- This may or may not be the same team that continues as the “Strategic Team” or “Leadership Team” moving forward (we may engage people on the planning team who may not remain on Leadership team today).
- This process is great opportunity for Professional Development; we want to make sure we involve key people – especially those taking on more leadership responsibilities.
- We want the Strategic Planning teams to fully engage in process and feel like they own their business unit strategic plan.
- Need to make sure all key functions are represented, including “shared services.”
- Key Company Stakeholders will provide stakeholder goals and expectations of the team and process.

Potential	KEY FUNCTION REPRESENTED						Key Lead	Has Cap	Strat Thk	Pos Att	Div Tht	Comments
	Pres	Sales	HR	Mkt	Fin	Ops						

Key Lead: Key leader in the organization who will benefit from Professional Development.
Has Cap: Has capacity to dedicate to the strategic planning process and will not be overwhelmed.
Strat Thk: Has ability to be a strategic thinker, has new ideas, thinks big / visionary.
Pos Att: Displays a positive attitude and represents are core values, most of the time 😊. Wants to be included.
Div Tht: Brings a different perspective to the team due to diverse background, experience, length of time. Thinks differently.

