

## Get the best Annual Planning from your leadership. Go Offsite!



 [Click for an overview](#)

IntelliVen offers four different offsite sessions that provide leadership teams with a framework and structure to work on strategy and operating plans.

Each session is specially designed to drive to a clear focus and team alignment on a specific aspect of operations.

The four sessions are described below. The first sets a solid foundation and is designed to be complemented by any of the other three in succeeding years.

### 1. [How to orchestrate an Annual Planning Offsite](#)

**This session serves as a backbone, to any offsite.** It complements subsequent sessions in any annual sequence. **Its purpose is to celebrate successes** in the year ending and review, discuss, and refresh:

- Alignment on **Where** the organization is headed.
- **Why** it is headed there.
- **Performance against goals** over the past year.
- The foundation for coming year **performance targets** and **Strategic Initiatives**

[\*A detailed approach to Annual Planning\*](#)

### 2. [How to Get Clear about Whose Problem the organization Solves](#)

The purpose of a business is to solve a problem for a customer.

This workshop gets the top team aligned on:

- **What** the organization provides
- To **Whom**
- **Why** customers pay for it

[\*More on how to 'Get Clear'\*](#)



## Get the best Annual Planning from the leadership. Go Offsite!

---

### 3. How to lay out and launch Strategic Initiatives

This session uses a structured approach to communicate what leaders seek to accomplish, given:

- How things are now and why they must change.
- What it will be like when change occurs, and how change will be accomplished.

After setting the context for change, the session drives to:

- Describe an approach to achieve targeted benefits.
- Launch initiatives using a structured Initiative-to-Action guide.
- Set a plan to govern to completion.

[Use the Change Framework](#)

### 4. How to assess and develop the ideal mix of leadership team skills

**The ideal mix of top team skills varies by stage of organization maturity.**

This session engages executives in an assessment process to identify development and hiring needs which, when addressed, increase the odds of success as the organization matures.

[Develop C-Suite teams](#)

### 5. How to use IntelliVen leadership sessions

- ***Do not do them all at once.***
- ***Use the first one as the backbone and incrementally complement with the others in successive years.***
- Share offsite deliverables with the board and employees.
- Guide and govern operations against the board-approved plan, report on progress monthly, and start the planning cycle again mid-year.

---

[eMail](#) or call **1-415-848-2634** to speak with IntelliVen about planning, preparation, and facilitation support for any or all of the above sessions tailored to your organization's needs.

