

Get the best Annual Planning from 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 complement with one 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**.

 For the detailed approach to this session, [Click here](#)

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.

 For detailed instructions on the Get Clear exercise, [Click here](#)



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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.



For instructions on how to use the Change Framework, [Click here](#).

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.



For a white paper on How to Develop C-Suite teams, [Click here](#).

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 with the board, and communicate to employees, offsite deliverables.
- Guide and govern operations against the board-approved plan, report on progress monthly, and start the planning cycle again mid-year.

[eMail](#) or call **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 precise needs.**

