



How to run a Strategy Review Workshop

A guide for charity CEOs

Introduction

This is a short guide for charity CEOs running a one-day (or half-day) online strategy review workshop with the Board. It covers how to plan, prep, structure, and follow up for the greatest chance of a successful outcome; an agreed strategy, and increased understanding and cohesion between CEO and Board.

This guide assumes that either a) this is an annual review of the current strategy or b) there has been an appropriate strategic thinking process, with input from the team and key stakeholders which has generated the initial components of the strategy, to be further discussed and developed with the Board.

Please note, this guide does not consider all aspects of a full strategy development process. For a quick pointer on what else to consider, click [HERE](#) for a Strategic Planning Readiness Checklist.

Clarify Purpose

The core purpose of the workshop session should be to gather input; to elicit ideas, insights, and thoughts from the Board for review and incorporation into the strategy draft. After the meeting, the Executive can take time to reflect, clarify, and consider the implications before factoring into the plan. The Board then reviews the updated strategy at the next Board meeting.

It's worth noting in advance potential deviations, or 'pet' subjects, where discussion may go off at tangents so that we can spot these and steer away. Conversely, if there are awkward strategic issues that haven't been addressed, we need to decide when to tackle them ahead of, or specifically during the discussions. It's interesting how often strategy reviews can sometimes dance around an important but uncomfortable issue!

Structure the workshop

As we define the meeting purpose, outputs and questions we want to address, it can be tempting to overestimate the ground that we can cover. This is particularly so for online meetings, as there is less natural 'to and fro'; we want to invite everyone's engagement and the process takes longer.

Whether planning a half day or a full day, if we run for more than 90 minutes without a break the quality of engagement will diminish. A good structure is:

- 90 minutes session; 10 minutes arrivals / housekeeping, 20 minutes opening / presentation, 20-30 minutes breakout group discussion, 30-40 minutes plenary discussion
- 30 mins break

- 90 minutes session; 20 minutes opening / presentation, 20-30 minutes breakout group discussion, 30-40 minutes plenary discussion (allowing 10 minutes transition time)
- FINISH or one hour lunch
- 90 minutes session; 20 minutes opening / presentation, 20-30 minutes breakout group discussion, 30-40 minutes plenary discussion (allowing 10 minutes transition time)
- 30 mins break
- 90 minutes session; 20 minutes opening / presentation, 20-30 minutes breakout group discussion, 30-40 minutes plenary discussion, 10 minutes wrap-up

Note that if we plan a half-day session in the afternoon, we attendees may not arrive with headspace for fresh ideas and thoughts. Morning starts are preferable where possible.

Spark Engagement

We want to spark interest and engagement ahead of the meeting. Generally, this means booking the day well in advance to facilitate attendance. On the invitation, we highlight that this is a generative, rather than functional discussion and that we are looking for advice, guidance, and insights. Experience shows that when Board members are specifically invited to add value and share their perspectives, they are more likely to attend.

Pre-reads

The success of the meeting relies in part on providing participants with sufficient ‘warm-up’ to the discussion. We can forget that we are asking people fully involved in their work and family lives to jump into high-level strategic thinking from a cold start, without giving them time to reflect in advance. It’s helpful to provide either a few clear, focussed pre-reads or a short slide show video presentation and preferably a mix tailored to the participants different preferences. In addition, I recommend including specific questions to consider so that they are proactively engaging as they review the materials.

Agenda

On the invitation email, as well as the time, meeting link and note-taking link, share the purpose and outputs of the day. Note there will be breaks, but I don’t advocate sharing a full agenda as it can prevent us from steering the discussion in the way we see as most helpful on the day. However, any facilitator should have their own detailed agenda (with the script and ‘stage directions’ if needed.) It helps to be clear on what we are ‘trading’ if we decide to allow a topic of discussion to run longer than originally planned.

Running the meeting

If the CEO or Chair is facilitating, then it is important to be explicit if/when they want to ‘take off the facilitation hat’ and move to input into the discussion.

Breakout Rooms

I recommend using Zoom for online workshops, for many reasons, including the ease of using breakout rooms. These are hugely helpful with groups of six or over, as it allows all participants to be heard and talk through their ideas with the strongest responses surfacing for sharing in the plenary. There are breakout room guidelines on the Zoom.us website and I recommend exploring its functionality in advance.

As a facilitator, I suggest staying in the main room (others can remain too as a breakout group) because there is an 'ask for help' button within all the breakout rooms that people can use to call if they require clarification on the questions that have been set.

Note-taking

We cannot hear every breakout discussion, and the plenary discussion never feels long enough to share everyone's thoughts. As such, it's a great idea to set up a shared note-taking facility. I use Google Docs but anything where people can note down additional thoughts or insights is fine. Set this up in advance and in the meeting invite email, share the hyperlink, explain how to open it and encourage people test-write on the document in advance of the meeting. This works better than using 'chat' as it doesn't distract from the flow of conversation and the larger white space encourages sharing and elucidation.

Don't forget to record the meeting. It can be transcribed later using <http://otter.ai/> or a similar facility if helpful.

Following the workshop

Rather than share minutes of the meeting, circulate an updated strategy document and ask the participants for further written comments and input. Then update the document and flag any outstanding questions for Board discussion.

In most cases (although it's somewhat context specific) this is now the point to return to key stakeholders to give them sight of the final draft and opportunity to comment before Board sign-off. Hopefully, if the initial consultation process was comprehensive enough, this should go well.

Take the final draft to the next Board meeting for discussion and sign-off. I suggest that this is the first item on the Agenda to ensure the process isn't short-cut due to time limitations.

What if...

I hope that this has been a helpful guide to the fundamentals of running a short Strategy Review process.

If you're unable to achieve consensus, an experienced perspective can often be helpful. Feel free to contact me [here](#) for a no obligation call and we can review the situation and your options for leading the process to a successful outcome.