Strategic Planning Workshop

Leadership Engagement & Change Sponsorship

Supervision Suite · Modules and workshops

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Part 1 · Overview

3-4 hours

Master the strategic skills needed to lead organizational change and engage executive leadership effectively. Learn executive interviewing techniques, change sponsorship mapping, and decision-making frameworks essential for supervisors and clinical leaders navigating complex organizational dynamics.

Learning objectives

- Conduct effective executive interviews for buy-in
- Map change sponsorship across organizational levels
- Develop decision-making frameworks for clinical settings
- Navigate organizational politics professionally
- Build coalitions for change initiatives
- Create strategic plans for supervision improvement

Key topics

Executive Communication · Change Sponsorship · Coalition Building · Organizational Politics · Strategic Planning · Decision Frameworks · Stakeholder Management · Initiative Leadership

Audience and prerequisites

- Clinical supervisors leading change initiatives
- Clinical directors implementing new programs
- Supervisors seeking organizational influence
- Leaders navigating complex hierarchies
- Anyone responsible for supervision program development
- Understanding of organizational dynamics
- Current leadership or supervisory role
- Active change initiative or program to implement

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Part 2 · Workshop

5 min

Strategic Planning for Supervisors

A comprehensive workshop combining Executive Interviewing, Change Sponsorship Mapping, and Decision-Making Framework development for clinical supervisors and leaders.

Workshop Components (6+ hours total)

Activity 1: Executive Interviewing (3.5 hours)

Engage leadership in gathering strategic information through structured interviews with diverse stakeholders.

Activity 2: Decision-Making Framework (2+ hours)

Create customized ground rules for effective team decision-making based on research and experience.

Activity 3: Change Sponsorship Mapping (1.5 hours)

Identify key influencers and develop strategies for building leadership support for change initiatives.

Materials Needed: Newsprint, markers (blue and black), easels, comfortable room, sticky notes, index cards

10 min

Executive Interviewing

Getting top management engaged and informed

Purpose & Background

Top management involvement is the critical success factor in any planning process. This activity accomplishes two major objectives:

- It truly involves and engages top management in gathering strategic information
- It signals to employees that managers are committed to the success of the planning process

Key Insight:
The most effective way to get quality information is to ask employees what they think. By asking strategic questions, managers communicate that they value and respect opinions and are open to new ways of thinking.

Goals of This Activity

- Provide a rich database of quality information for senior managers
- Communicate visibly that senior management is open to new ideas and committed to learning
- Give executives access to information they don't normally receive

20 min

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Step 1: Information Needs Assessment

What do we need to know?

Activity Instructions (15-20 minutes)

Work in pairs. Come up with descriptors of what kind of information or knowledge you want to gather to really understand the complexities of your organization and planning capabilities.

The facilitator will create a master list, taking one idea from each pair until all information needs are captured.

Information Categories to Explore

Select the types of information you need to gather:

- ☐ Organizational Climate
- ☐ Technological Capacity
- ☐ Employee Morale
- ☐ External Threats
- ☐ Employees' Perception of Leadership
- ☐ Marketplace Changes
- ☐ Organizational Strategy
- ☐ Organizational Weaknesses
- ☐ Competitors' Perception
- ☐ Customer Service Quality
- ☐ Financial Data
- ☐ Organizational Strengths

20 min

Step 2: Stakeholder Identification

Who should we be talking to?

Define stakeholders as individuals or groups that have a "stake" or interest in your future. These could be people who can help your organization or hurt it.

Each supervisor should think individually and create a personal list. Then create a master list using round robin approach.

Important:

The goal is to create a comprehensive and dynamic list of stakeholders to get as many perspectives as possible. Organizations typically identify 60-70 different stakeholders!

Potential Stakeholder Groups

Select relevant stakeholder groups for your organization:

- ☐ Office Clerks

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- ☐ Salespeople
- ☐ Customer Service
- ☐ Security
- ☐ Marketing
- ☐ Human Resources
- ☐ Outside Suppliers
- ☐ Long-Term Customers
- ☐ Former Customers
- ☐ New Customers
- ☐ Technology People
- ☐ Financial Analysts
- ☐ Buyers
- ☐ Personnel
- ☐ Maintenance
- ☐ Competitors
- ☐ Long-Term Employees
- ☐ Part-Time Employees
- ☐ Contractors

60 min

Step 3: Crafting Interview Questions

Strategic questions that reveal truth

Question Development Process (45-60 minutes)

Instructions

- Form three mixed groups of managers
- Each group develops 6-10 strategic questions
- Questions should reveal the kind of information identified earlier
- Use round robin to create master list of all questions
- Use Las Vegas Voting to select best 5-7 questions for interviews

Example Strategic Questions

Question #1:

If you were to talk to friends about coming to work for this organization, what three things would you tell them that would convince them this is a positive place to work?

Question #2:

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Describe how information is communicated throughout this organization. Are you satisfied with the current communication system?

Question #3:

What are some things, from your perspective, that need to be talked about but never seem to be discussed in an open forum?

Question #4:

What are the really lived values in this organization? What values can we observe in action, not just talk about?

Question #5:

If you were in charge of this organization, what two things would you change immediately to improve effectiveness?

Your Team's Interview Questions

Record the 5-7 questions your team will use for stakeholder interviews...

Assignment: Each manager should "own" a diverse list of 10-12 stakeholders to interview over the next two weeks. Do NOT interview only people in your own unit or division.

120 min

Part 2: Interview Synthesis

What we learned from stakeholders

Synthesis Meeting (2 hours)

This meeting occurs after all interviews are completed. Managers come together to share and synthesize findings.

Pre-Work (before meeting):

Each manager should answer these questions based on their interviews:

- What were the three most common findings?
- What are three things you learned that you didn't know before?
- What are five areas of concern for employees?
- What are three strengths this organization possesses?
- What external challenges do we face?
- How are we perceived by customers/clients? Suppliers? Employees?

Meeting Process:

- Form two groups of 5, share homework findings (20-30 min)
- Create presentation on newsprint capturing main findings
- Groups present to each other, noting common themes and surprises
- Facilitate discussion to identify the most important information

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Most Common Findings

What themes emerged across all interviews?

Areas of Concern for Employees

What are employees worried about or frustrated by?

Organizational Strengths

What strengths did stakeholders identify?

External Challenges

What external threats or market changes were mentioned?

30 min

Decision Framework: Poor Decisions

Learning from what doesn't work

Task #1: Analyze Poor Decision Making (30 minutes)

Divide into 4 mixed groups of 6 participants each. Describe a group decision you were involved with where you believe a poor decision was made.

Include elements that made it poor - elements over which you had some control or influence.

Elements of Poor Decisions

What factors contributed to poor decisions in your experience?

- ☐ Rushed the decision-making process
- ☐ Didn't consider the alternatives
- ☐ Didn't seek out quality information

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- ☐ Deferred to a powerful leader
- ☐ Didn't use outside information
- ☐ Didn't think about long-term consequences
- ☐ Limited involvement by whole group
- ☐ Group dominated by one person

Your Poor Decision Story

Describe a poor decision and what made it ineffective...

30 min

Decision Framework: Good Decisions

Learning from what works

Task #2: Analyze Effective Decision Making (30 minutes)

Describe a group decision where you believe a good decision was made - one that obtained the result you wanted.

Capture the elements that made it an effective decision, including what you did to make it a good decision.

Elements of Good Decisions

What factors contributed to good decisions in your experience?

- ☐ Organized process
- ☐ Diversity of ideas embraced
- ☐ Took enough time
- ☐ Good preparation and planning
- ☐ Used data to drive decisions
- ☐ Involved stakeholders appropriately
- ☐ Considered alternatives fully
- ☐ Thought about long-term impact

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Your Good Decision Story

Describe a good decision and what made it effective...

After Break: The facilitator will share research on effective decision making from experts like Dietrich Dorner ("The Logic of Failure") and Edward de Bono ("The Thinker's Toolkit").

40 min

Creating Team Ground Rules

Your decision-making framework

Research Insights on Decision Making

From Dietrich Dorner's "The Logic of Failure":

- We fail to anticipate side effects and long-term repercussions
- Effective decision makers ask "why" questions vs. "what" questions
- We assume absence of negative effects means correct measures
- Good decisions consider multiple aspects of a system (whole picture thinking)
- We have difficulty absorbing new information (watch for overload)

From Edward de Bono's "The Thinker's Toolkit":

- Using visuals helps us engage more brain power and see correlations
- Failure to consider alternatives fully is the most common flaw
- Need patience to seek the best solution vs. quick fixes
- Must map out complexity before diving in and making decisions

Ground Rules Development (40 minutes)

- Re-form into 4 new mixed groups (count off 1-4)
- Each group creates 4 ground rules/agreements based on learnings (15 min)
- Pair groups 1+2 and 3+4, combine to create best 5 rules (15 min)
- Use Las Vegas Voting to determine final 4 ground rules for the team (10 min)

Example Ground Rules:

- If consensus can't be reached quickly, we'll use the 85/15 rule
- No closure until everyone has had input - we'll pause for concerns
- We will always ask about long-term impact before deciding
- We will use visuals to map complexity of our problems

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Your Team's Ground Rules for Decision Making

Record your team's 4 ground rules for effective decision making...

These should be specific, actionable, and stand-alone rules that you'll actually use.

80 min

Change Sponsorship Mapping

Identifying and building leadership support

Purpose (Based on Daryl Conner's Work)

The single most important factor in successful organizational change is competent leadership at the top. Without shared commitment from the leadership group, change efforts create "black holes" where the message goes in but nothing comes out.

We need to identify:

- People who need to play a leadership role in strategic planning
- How the leadership structure must work together in sponsoring change
- Political dynamics and change issues inherent in the process
- Strategies for developing appropriate leadership roles

Activity Instructions (80 minutes)

Step 1: Identify Key Questions (15 min)

Work in pairs for 2-3 minutes on these questions:

- What groups or areas will be affected by any change?
- Who influences these groups and sanctions their change efforts?

Step 2: Create Sponsorship Map (20 min)

Draw a map of key people, relationships, and political influences. Show:

- Direct control relationships (solid lines)
- Advocacy and informal influence (dotted lines)
- Keep moving up the hierarchy until no one above requires support

Step 3: Assess Support Levels (15 min)

For each sponsor, assess:

- Where is sponsorship commitment strong or weak?
- Do sponsors have necessary skills and understanding?

Step 4: Develop Strategies (30 min)

In small groups, develop strategies to enhance sponsor support:

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- Training and education for potential sponsors
- Delegation with transferred authority
- Identifying change advocates to work with sponsors
- Personal visits and one-on-one engagement

Your Sponsorship Map Notes

Describe key sponsors, their relationships, and influence levels...

Identified Weak Links

Where does key support not yet exist? Who needs development?

30 min

Action Planning

Next steps for implementation

Strategies for Building Sponsor Support

Select strategies your team will pursue:

☐ Provide change process training to key sponsors

☐ Create burning platform communications

☐ Delegate with transferred authority (not just responsibility)

☐ Identify and empower change advocates

☐ Schedule one-on-one visits with hesitant sponsors

☐ Modify planning process to involve more stakeholders

☐ Create communication plan for interview findings

☐ Establish feedback mechanism for ongoing input

Workshop Complete!

You've completed strategic planning activities to engage leadership, create decision frameworks, and map change sponsorship.

Key Outcomes:

- Rich database of stakeholder perspectives
- Customized decision-making ground rules
- Sponsorship map with development strategies

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- Action plan for building leadership support

References: Conner, D.R. "Managing at the Speed of Change" (1994); Kotter, J.P. & Heskitt, J.L. "Corporate Culture and Performance" (1992)

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