

# BLAIS


+ ASSOCIATES




## Strategic Planning and Execution

*Building Leaders.  
Advancing Careers.  
Growing Companies.*

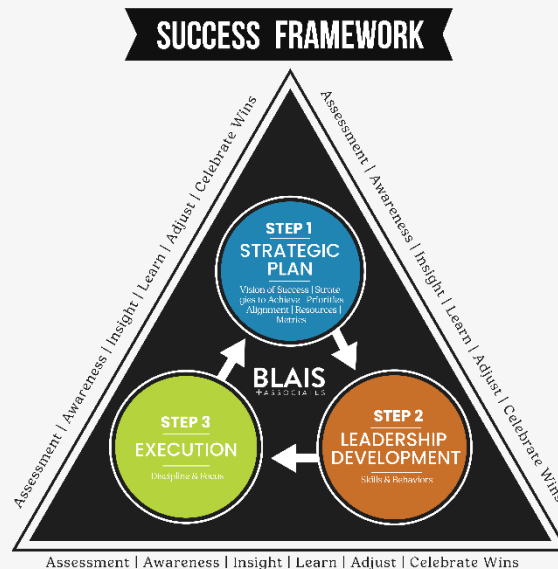
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At Blais + Associates, we believe there are three keys to professional and personal success. First, start by defining a Strategic Plan that clearly identifies where you want to go and how to get there. Second, develop the Leadership skills and behaviors to enable execution. And finally, ensure disciplined and focused Execution with clear accountability. Not rocket science in theory we know, but difficult to pull off, especially on your own.



We always start with a clear plan of where we want to go, even though executing is important too and more fun. That said, we realize most people are not fond of planning. They think it takes too long, it's boring, and some would even say it's a waste of time. We couldn't disagree more! It does take more time up front, but our experience suggests it takes less time in the long run. In addition, your chance of success is greater because you took the time to gain the clarity you need to define success, as well as what strategies and tactics are most likely to get you where you want to go, leading to less wasted execution.


Our "Strategic Planning and Execution Framework" is a comprehensive seven-step process designed to provide the necessary structure to build and execute your plan, but with the flexibility to meet the unique needs of the client. Since every organization is different in size, information access, skills, and time available to dedicate to plan development, the needs to building their strategic plan varies. To that end, rather than conduct a 2-day marathon planning meeting like many others do, we recommend conducting multiple 2-hour sessions to move through the steps. Utilizing these shorter sprints provides many benefits all leading to a well thought out plan ready for execution by an energized and aligned team.

- Opportunity to iterate and perfect over time
- More time to prepare, discuss and gel as a team between meetings
- Leadership development and alignment
- Ability to leverage Blais + Associates' expertise over time


At Blais + Associates we apply a “coaching” approach to our Strategic Planning process which is a collaborative effort between the Coach and Client in a thought-provoking and creative process that inspires the client to discover possible solutions and take action to achieve desired outcomes. This approach contrasts with a consultative approach which leans toward giving advice or doing it for you which usually falls short due to lack of ownership. At Blais + Associates we can do both, but we prefer coaching because it empowers our clients to drive and own the results and builds the skills to do it themselves in the future.

We take a long-term approach in serving our clients by helping you not only develop your plans, but also sticking around in some capacity to ensure you achieve them. This comprehensive and iterative process not only drives the development of your Strategic Plan, but also develops the individuals and the team as whole. And we try to make it painless and fun too!





So, you're probably wondering how this all happens, right? We'll utilize the following process in assisting you with developing your Strategic Planning and Execution Framework.

1. Work with leadership to define core strategic planning team.
  2. Meet with each stakeholder for a confidential discussion to gather feedback as input to the strategic planning process.
  3. Conduct a kick-off meeting with core strategic planning team to review Strategic Planning and Execution Framework and set expectations.
  4. Facilitate strategic planning sessions with the core team to develop plan.
    - a. The framework process is designed for the core team to work together on their own first for each section to determine their responses, without their Coach. This process is enabled by a facilitator guide which provides education on the topic being addressed and then asks relevant questions in each area to help formulate your draft response. Of course, if you get stuck, we're always here to help prior to our formal coaching session. We then follow-up with a 2-hour coaching session with Blais + Associates to review your responses, challenge, guide, and define priorities, working toward finalizing your plan.
    - b. The number of sessions is flexible and based on the need for plan completion.
  5. Facilitate 2 - 3 quarterly review meetings for the first year to support execution and accountability.
  6. Be present for year two planning session to transfer the strategic planning torch.
  7. Support the core strategic planning team as needed throughout the process.
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We hope you'd agree that our process is straightforward and designed to be flexible so we can meet the various needs of our clients.

### **Engagement Duration: 12 months total**

- Plan development = ~3 – 6 month, depending on the speed at which the team can complete
- Review and accountability = ~ 6 months, depending on when the plan is complete, and execution begins

### **Who Can Benefit?**

Small to large businesses and non-profits who are seeking an experienced partner to support their strategic planning and execution needs.

### **Additional Program Support**

- eMail support throughout engagement
- Networking introductions as appropriate