



The Merits of Using a Strategic Planning Facilitator

You may be considering to bring a team of people together to accomplish one of the most significant developments in the history of your organization – to develop a strategic plan for the next few years. An important question is whether or not to bring in an outside consultant – a strategic planning facilitator, to plan, conduct and follow-up the session.

We at Hewat Strategic Edge are not impartial on this question. Not only do we provide hands on facilitation, but we also provide training to our clients' internal facilitators, who have chosen to deliver our planning products with their people. In all situations it is imperative that participants are extremely satisfied with the quality of their engagement and with the progress that is made by the group.

This can only be achieved with three elements being present:

- Employing a proven process that ensures results
- Employing a facilitator with the skillset to keep the process moving
- Engaging a facilitator with enough experience to add value to the discussions

1. A Process that Ensures Success

A successful process is one that follows a prescribed sequence of activities and produces expected results. A strategic planning process should do this. The process should be a proven one. It should be expected to always succeed.

The last thing you need is to embark on a planning process with little expectation of success. Frankly, that's what is happening when you work with no facilitator, or with a facilitator that is "winging it".

You need to understand the outputs that are expected and the critical steps to get there. Evidence of a stable process is when there are participant guides, supported with quality presentation materials. Credentials in the form of client testimonials are also an important criterion when evaluating the planning process.

2. A Skillset that Enables Progress

Facilitators should also bring more than a process. They must have the interpersonal skills to communicate ideas, provoke questioning, enhance participation and manage conflict. Moreover, the facilitator must be able retain control of the process, so as not to jeopardize the overall chances of success.

3. Experience that Adds Value

Having conducted one strategic planning session is nice but having successfully conducted many of them means the facilitator has seen many variations on similar themes. As a client once said – 'each planning session must be a mini-MBA'. That may be a stretch but having a facilitator that has experienced many discussions of organizational management and business strategy, as well as keeping current on the literature, means they may have the intellectual fuel to generate more cogent questions for the group.

If you are thinking about running a strategic planning process, ask yourself if having someone with a proven process and track record could improve the probability of your success.

For more on this, we have a blog entitled *Why Hire a Strategic Plan Facilitator?*
<https://www.hewatstrategic.com/blog/hire-strategic-plan-facilitator/#more-396>

We would love to know more about your needs and inform you about our capabilities.
If you are considering a Strategic Planning Session,



www.hewatstrategic.com