

A Guide for Executive Coaches

Coaching through the Onset of a Strategic Planning Process

The art of guiding executives through leading a strategic planning process positions leaders for longstanding success. This tool serves as a resource for executive coaches guiding clients through the onset of a strategic planning process. Using the sample reflective questions, a coach may guide clients to realize the importance of clearly communicating the purpose of the process to all stakeholders, wisely selecting steering committee members, and effectively navigating the initial challenges of capturing the current state of the organization.

Articulating and Communicating the Purpose of the Process

Key Points:

- Clearly defining the purpose of the strategic planning process
- Building a cadence of communication to all stakeholders
- Ensuring the purpose aligns with the organization's mission and vision

Possible Coaching Questions:

- Why did you choose to engage in the strategic planning process?
- When you and your team “get this right,” what is the result?
- What is the core purpose of your strategic planning initiative?
- Who are the key stakeholders that need to understand the purpose of the process?
- How might you effectively communicate this purpose to your team and stakeholders?
- How does this purpose align with your organization's mission and vision?

Selection of Steering Committee Members

Key Points:

- Identifying the purpose of the steering committee
- Identifying key leaders able to make critical decisions and support leading the process
- Creating clarity around roles and responsibilities
- Ensuring diversity in perspectives, skills, and experiences
- Including various representation for comprehensive input

Possible Coaching Questions:

- Knowing the steering committee will be making key decisions related to the strategic planning process, what experiences do you want to ensure you have represented on the committee?
- How might you ensure your steering committee represents a diverse range of perspectives?
- How might you ensure that selected members represent a “positive voice” across the organization for this process?
- What criteria will you use to select members who can contribute to the strategic planning process effectively?
- Who in your organization consistently brings positive energy and valuable insights?
- How might you/we effectively communicate to the steering committee members their roles and responsibilities?

Capturing the Current State of the Organization

Key Points:

- Creating understanding of the purpose of this phase of the process
- Creating clarity around the technical aspects of this phase of the process
- Identifying key players in this phase

Possible Coaching Questions:

- Understanding that capturing the “current state of your organization” provides “the ‘current location’ in any navigation system,” how might you communicate the purpose of this phase to key stakeholders?
- Recognizing that this phase involves collecting and identifying various sources of baseline information, such as _____, which organizational roles are essential to seek support from?
- How do you envision this analysis informing your strategic priorities moving forward?

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Additional Coaching Questions:

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