

Strategic Planning Retreat Exercise Guide

To maximize the value of your retreat and propel you toward your desired retreat outcome, your agenda should include a balance of sharing information with attendees and soliciting their responses. Question and answer series or unstructured discussion time are the most common methods of collecting attendees' ideas, but these models rarely foster critical conversations or truly leverage the collective expertise of your participants.

Instead of defaulting to another Q&A, consider using one of the following exercises to probe deeper into participants' thinking and reveal more meaningful insights.

Exercise	Best For:
Scenario Planning	Evaluating perceived threats and brainstorming responses
SWOT Analysis	Providing a comprehensive review of the organization as a whole or a specific strategic initiative
Forced Ranking	Quantifying opinions and creating a hierarchy of issues to address in the strategic plan
Imaginary Tweet	Reflecting on attendees' biggest insights or takeaways of an issue or session
Text Message Response	Allowing participants to candidly voice their opinions without fear of public speaking or disapproval
Polling	Quantifying the opinions of stakeholders in real-time
Casino Bets	Understanding relative importance of priorities

Scenario Planning



Purpose:	To construct potential futures based on current trends and assumptions of how various market players will act in order to develop your strategic plan
Response Type:	Open-ended
Participant(s):	Small groups, individual
	▶ Refer to the Scenario Planning Workshop Guide to learn how to facilitate scenario planning discussions.
Materials:	Paper and pens (<i>Use the work pages in the Scenario Planning Workshop Guide to facilitate the exercise</i>)
Pros:	This exercise uses stakeholders' diverse perspectives to evaluate perceived threats and brainstorm responses.
Cons:	This can be a time-consuming exercise as time is needed for brainstorming and role playing.

CASE PROFILE: LifeBridge Health

The strategic planning team at this four-hospital system used scenario planning to strategize for a refresh of its strategic plan.

At their retreat, participants assumed the role of either a competitor, payer, or patient and imagined their potential reactions to numerous scenarios including new partnerships and major regulatory changes. By role playing, the planning team developed a stronger understanding of the strategic initiatives and identified the reasons for committing to key elements of the strategy, as well as the underlying assumptions. This scenario planning exercise allowed LifeBridge to act nimbly and decisively in response to a market change.

CASE PROFILE: WellSpan Health

The retreat planning team at this integrated delivery system with six hospitals and a multispecialty physician group created a variety of scenario planning exercises to understand the future impact of consumers on their system.

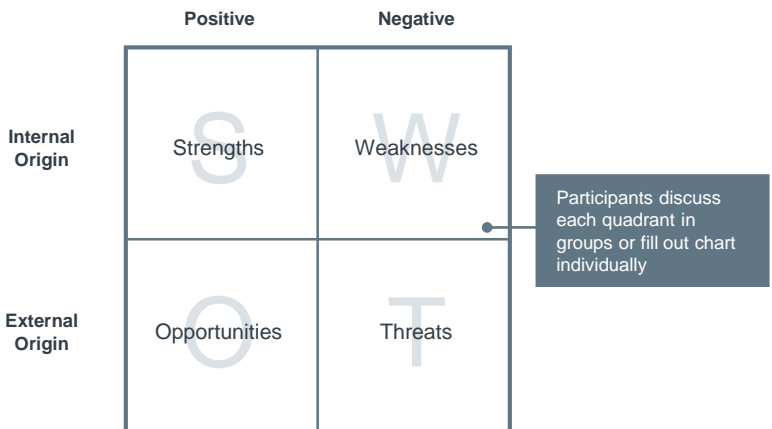
The team gave participants examples of disruptive innovation and asked how the innovation would impact consumers, their market, and organizational performance. Participants took on different perspectives to characterize the health care consumer of 2025, as well as the implications for WellSpan Health.

SWOT Analysis



- Purpose:** To develop a list of major internal strengths (S) and weaknesses (W), external market opportunities (O), and threats (T) that your organization can affirm and prioritize through its strategic plan
- Response Type:** Open-ended
- Participant(s):** Small/full group, individual
- Materials:** SWOT chart (see example below), pens
- Description:** Groups of participants brainstorm each section of the SWOT analysis, and individual participants complete the activity by filling out a SWOT chart after the discussion with their understanding of the organization and market.
- Pros:** This exercise allows participants to critically explore a comprehensive view of either the organization as a whole or a specific strategic initiative.
- Cons:** SWOT analyses create a one-dimensional view of each attribute being categorized as a strength, weakness, opportunity or strength, and has no weighting factors.

Sample SWOT Analysis Chart



Source: Frisch B, Chandler L. "Offsites That Work." Harvard Business Review, June 2006. <https://hbr.org/2006/06/offsites-that-work>. Market Innovation Center interviews and analysis.

Forced Ranking



Purpose:	To force participants to make trade-offs on various scenarios and come to a consensus
Response Type:	Open-ended, multiple choice
Participant(s):	Full group, individual
Materials:	List of options for each forced ranking scenario
Description:	Each group of participants is given a list of items or ideas which they must discuss and rank as a group. For example, a forced ranking question might be “Which health care national trend will have the biggest impact on our organization in the next three years?” and the options could include consumerism, policy reform, mergers and acquisitions, and behavioral health.
Pros:	This exercise allows the planning team to quantify opinions and create a hierarchy of issues to address in the strategic plan.
Cons:	Participants force rank based on current understanding of the market rather than building conditional statements (ex. consumerism will have the biggest guaranteed impact, but if the ACA is repealed, policy will have the biggest impact...)

Imaginary Tweet



Imaginary Tweet

Purpose:	To identify the most salient points of table top discussions
Response Type:	Open-ended
Participant(s):	Small groups, individual
Materials:	Table-top discussion questions, paper, pen
Description:	Participants are asked to discuss a specific issue and then formulate an imaginary tweet or headline that complies with Twitter’s 140-character limit that addresses the main insights of the group discussion. One example of a table-top discussion is to ask participants to discuss emerging signs of consumerism across their organization.
Pros:	This exercise makes participants reflect on their biggest insights or takeaways and summarizes those in just a few words for the strategy team’s easy digestion.
Cons:	Groups may uncover many more valuable insights and ideas than can fit in 140 characters; these may be lost if a scribe is not recording the group’s discussion.

Text Message Response



Purpose:	To collect individuals' short responses to set questions
Response Type:	Open-ended
Participant(s):	Full group, individual
Materials:	Cellphone, pre-selected question, optional text collecting tool
Description:	Participants are asked to text in a response to an open-ended question. An example question may be, "Why do you think our proposed partnership is a good or bad idea?"
Pros:	This exercise allows participants to candidly voice their opinions without fear of public speaking or disapproval.
Cons:	Due to the nature of text messaging, participants may feel as if they are being forced to simplify their thoughts to fit in a text message. This exercise also requires all participants to have cellphones and know how to text.

Polling



Purpose:	To quantify the opinions of stakeholders in real-time
Response Type:	Multiple choice
Participant(s):	Full group, individual
Materials:	Smart phones, pre-created polls on websites including Poll Everywhere and DirectPoll, or color-coded index cards and chart paper
Description:	Retreat participants respond to a series of pre-created poll questions. One example of a poll question is "Which strategic initiative do you feel is most important to include in the strategic plan?" Participant responses are recorded in real time through the polling website, or by a scribe who tallies the number of raised color-coded index cards on chart paper.
Pros:	This exercise allows you to quantify opinions and create a hierarchy of issues to prioritize through the strategic plan. Seeing results in real-time allows for dynamic conversation.
Cons:	Learning a new technology on the spot can confuse some participants; select polling platforms require a paid subscription.

Casino Bets



Purpose:	To understand participants' priorities and how much more important one priority is than the next; to allow stakeholders to defend their decisions through discussion and persuade their peers to think critically
Response Type:	Open-ended
Participant(s):	Small groups, individual
Materials:	Poker chips (or similar small, standardized objects; five to ten per participant), paper and pen for making category labels
Description:	Participants are all given the same number of poker chips. They place their chips, representing the organization's annual budget, in piles corresponding to different spending categories. Participants have a discussion about their allocations and relative importance of the different items.
Pros:	This exercise reveals not only order of importance, but how much more important one item is than the next. It also requires all retreat attendees to contribute and can help participants network with one another.
Cons:	This exercise benefits vocal participants who are willing to persuade their peers. This exercise also requires more planning and materials than other exercises.