

# COMMUNICATION TEMPLATES

## STRATEGIC PLANNING SESSION

The following are written by the facilitator. Edit to reflect the position or title to which you have delegated the responsibility, as needed.

- 1 Month Before:** 1) Verbally announce the meeting, 2) Calendar block meeting & invite those who need to attend, 3) Ensure the invitation has been accepted, follow up as needed

Subject: Exciting News: Strategic Planning Session Scheduled!

Hi Team,

I am excited to announce that we have scheduled our upcoming Strategic Planning Session! This session will be a pivotal moment for us as we come together to shape the future of our organization and set clear, actionable goals for the next 12 weeks.

**Date:**

**Time:**

**Location:**

Your insights and contributions are incredibly valuable, and I am confident that with our collective effort, we will create a strategy that will drive us toward greater success.

I am excited to be your facilitator for the day to ensure we are on track and moving forward. Together, we will create, clarify, and translate our strategic objectives into measurable and achievable goals. We will also define specific action steps, assign responsibilities, and establish timelines so everyone is on the same page and working toward the same goals.

I've sent you a calendar invitation to hold the day and time. More details, including the agenda and specific preparation instructions, will follow soon.

Looking forward to our collaboration!

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**1 Week Before:** Email agenda

Subject: Agenda & Details for Our Upcoming Strategic Planning Session

Hi Team,

Our Strategic Planning Session is just around the corner! I've attached the agenda to help us prepare and maximize our time together. Please review and come prepared with your insights and ideas. Your active participation is crucial for our collective success.

Here are some additional details to help you prepare:

### **DETAILS**

Date:

Time:

Location:

### **WHAT TO EXPECT**

- [Name] will be our facilitator, guiding the conversations and keeping us on track
- [Name] will be our note-taker so you can fully participate instead of trying to capture everything we discuss and decide. The notes will be shared with you after the meeting.
- We will have snacks and drinks available throughout, but if there is anything you specifically want, feel free to bring it.
- Please log in at least 15 minutes early to test audio/video and get settled in (if the meeting is virtual)
- Please arrive 15 minutes early to grab a snack and get settled in (if the meeting is in-person).
- **We will begin promptly at [time]**

### **HOW TO PREPARE**

- Review the attached agenda
- Come with fresh feedback and ideas!

Please let me know if you have any questions or want further clarification. I'm looking forward to an engaging and productive session!

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**Day Before:** Reminder email

Subject: Reminder: Strategic Planning Session Tomorrow

Hi Team,

This is a friendly reminder that our Strategic Planning Session is tomorrow, [Date], at [Time]. **We will begin promptly at [Time]. Please arrive 15 minutes early** to grab a snack and get settled in. We have a lot to cover and need every minute!

We will focus on key areas that will shape our path forward, and your input is vital to our success. Please review the agenda and bring any relevant materials or ideas you wish to discuss.

Looking forward to a productive session with everyone!

Best regards,

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**Day After:** Follow-up thank you and next steps email

Subject: Next Steps Following Our Strategic Planning Session

Good Afternoon Team,

Thank you for bringing your energy, engagement, and collaborative spirit to yesterday's Strategic Planning Session. Together, we laid a strong foundation for the coming 12 weeks.

Here are the next steps to ensure we stay on track and translate our plans into action:

**1. Review Meeting Notes:**

Please review the attached meeting notes and ensure that all key points and action items have been accurately captured.

**2. Action Plan Development:**

Begin developing detailed action plans based on the goals and strategies we discussed.

- Set calendar reminders to look at them weekly
- Recruit help and/or delegate tasks along the way
- Calendar block tasks/projects that need to get done for the larger goal to be met

**3. Regular Check-Ins:**

We will have weekly check-in meetings to monitor progress, address challenges, and ensure we are on track with our strategic objectives. More details on these meetings will follow soon.

Let's continue to work together to bring our vision to life. If you have any questions or need further clarification on any of the next steps, please do not hesitate to contact me.

Thank you once again for your commitment!

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**1 Week After:** Feedback survey

Subject: Your Feedback: Strategic Planning Session

It has been a week since our Strategic Planning Session, and I hope you have had some time to reflect on the discussions and plans we outlined.

I would appreciate your feedback to ensure we continue improving our processes and making these sessions as effective as possible. Your insights are invaluable in helping us understand what worked well and what areas could be enhanced.

Please complete this 5-question feedback survey by [date]: [insert survey link]

 **RECOMMENDED SURVEY QUESTIONS:**

1. What aspects of the session did you find most helpful?
2. Which part(s) of the session can be improved or approached differently?
3. On a scale of 1 (not at all engaged) to 5 (very engaged), how engaged did you feel during the session? What could have helped you be more engaged?
4. On a scale of 1 (not at all effective) to 5 (very effective), how effective was the agenda and structure of the session in keeping us focused and productive?
5. Were the next steps clear and actionable?