

Annual Planning Leader Speaks Guidelines

As part of Annual Planning, the leader should carry out Leader Speaks to set the scene. This is an important leadership practice and leaders should not be afraid to lead and set direction for their team both for the day and for the coming 12 months.

Below is a list of topics you might want to cover. Adapt this as necessary depending on whether you are carrying out Corporate, Departmental or Team Annual Planning.

- (1) Start by explaining the areas you are going to cover and ask people to make a note of any clues about potential projects
- (2) Key things you want from the day
- (3) How strategy development and corporate planning works in the organisation. Show the Annual Corporate Planning Process and point out where today's activity fits into that sequence.
- (4) A look back - how we've got to where we are, key changes over the last 12 months - for both the organisation and team
- (5) What we've achieved/failed to achieve from what we set out to do this time last year
- (6) Key issues facing the organisation and team over the coming 12 months (and beyond if appropriate)
- (7) An overview/reminder of the organisation's mission, vision and strategies. Highlight and explain any recent changes.
- (8) What we're doing well (use customer satisfaction and process performance data to illustrate this if possible)
- (9) What we're doing badly (use customer satisfaction and process performance data to illustrate this if possible)
- (10) What we know about how we're viewed by the rest of the organisation (and how we know)
- (11) Any other data that provides clues as to what we should be working on
- (12) What your boss has asked you to focus on
- (13) Any other messages you want to get across
- (14) Finish by recapping what you have covered

Notes A Leader Speaks always has far more impact if key points are presented on flipchart, one sheet per topic.
Do not use PowerPoint.
Refer to sections 6 and 7 of The Complete Guide to Improvement for further context.
The session is followed by Reflections to generate feedback and questions.

Time As long as you need to get the job done but ideally no more than 30 minutes