

# Sample Agenda: Team Visioning & Strategy Session

For many leaders, changes on their teams happen frequently and rapidly. Maybe you have new team members joining your team. Maybe you have been given oversight of an additional function in your organization. Maybe your team simply need a refocus on what's important.

In any of these cases, examining the fundamental aspects of why the team exists and how it services the organization is time well-spent. Use this sample agenda to outline a solid day of team visioning and strategic planning.

## **Welcome and Introductions** (20 minutes)

*Goal: Set the stage, share workshop plan/objectives, and establish operational ground rules for the day.*

## **Icebreaker Activity: The Four Quadrants** (30- 45 minutes)

*Goal: Increase team member's understanding of one another on both a professional and personal level.*

## **Introduction to the Team Charter** (15 minutes)

*Goal: Outline the elements of the Team Charter and explain what we will create. Major elements include: Team Purpose, Team Norms, and Team Mission. A connection to the company values is made.*

## **Team Purpose: Why Do We Exist?** (60 minutes)

*Goal: Discuss why the team serves the company, its employees, and customers.*

## **Team Norms: How Do We Operate?** (60 minutes)

*Goal: Connect the team's daily actions and work to the purpose. Look for gaps and misconceptions.*

## **Team Mission** (60 minutes)

*Goal: Define team mission elements – who we serve, what we do, how we do it – and create possible mission statements. Statement could be finalized in this meeting or continued in a future team meeting.*

**Our Team Charter**

**Purpose**  
Why Do We Exist?

**Norms**  
How Do We Operate?

**Our Mission**

## **Closing Activity: Strength Bombardment** (30 minutes)

*Goal: Review of next steps and open action items. A warm closing activity focusing on team strengths.*