

# Sample Agenda: Team Visioning & Strategy Session

Changes to your team make-up can 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. Or, maybe your team simply needs a refocus on what's important.

In all of these situations, 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 members' 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 misconnections.

## Team Mission (60 minutes)

**Goal:** Define team mission elements – who we serve, what we do, how we do it – and create possible mission statements.

## Closing Activity: Strength Bombardment (30 minutes)

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

