

# BEYOND THE PLANNING RETREAT BUBBLE

## CREATING ALIGNMENT THROUGH COLLABORATION



What do we know about strategic planning?

### SWOT Isn't Enough

If you've done any strategic planning, you've probably engaged in some form of SWOT analysis. It's a tool used to help organizations identify (internal) Strengths and Weaknesses, and (external) Opportunities and Threats.

Strengths and Opportunities are considered helpful toward achieving goals, while Weaknesses and Threats are considered harmful.

	HELPFUL	HARMFUL
I N T E R N A L	<b>STRENGTHS</b>	<b>WEAKNESSES</b>
E X T E R N A L	<b>OPPORTUNITIES</b>	<b>THREATS</b>

SWOT is one tool in the planning toolbox, and today it isn't enough.

### Strengths-Based Planning 💪

Strengths-based planning helps Associations discover their identity, build on past victories, and align with member needs. That is the focus of this session.

\*\*\*AEI ATTENDEES\*\*\* DOWNLOAD ADDITIONAL SESSION RESOURCES AT [EVANFUCHS.COM/AEI](https://EvanFuchs.com/AEI)

# Strengths-Based Planning Worksheet

## STRENGTHS

- What are we most proud of as an association?
- What are three examples of us at our best?
- How can we build on our strengths?

## OPPORTUNITIES

- What are our members asking for?
- What challenges are they facing?
- How can we meet our members needs?

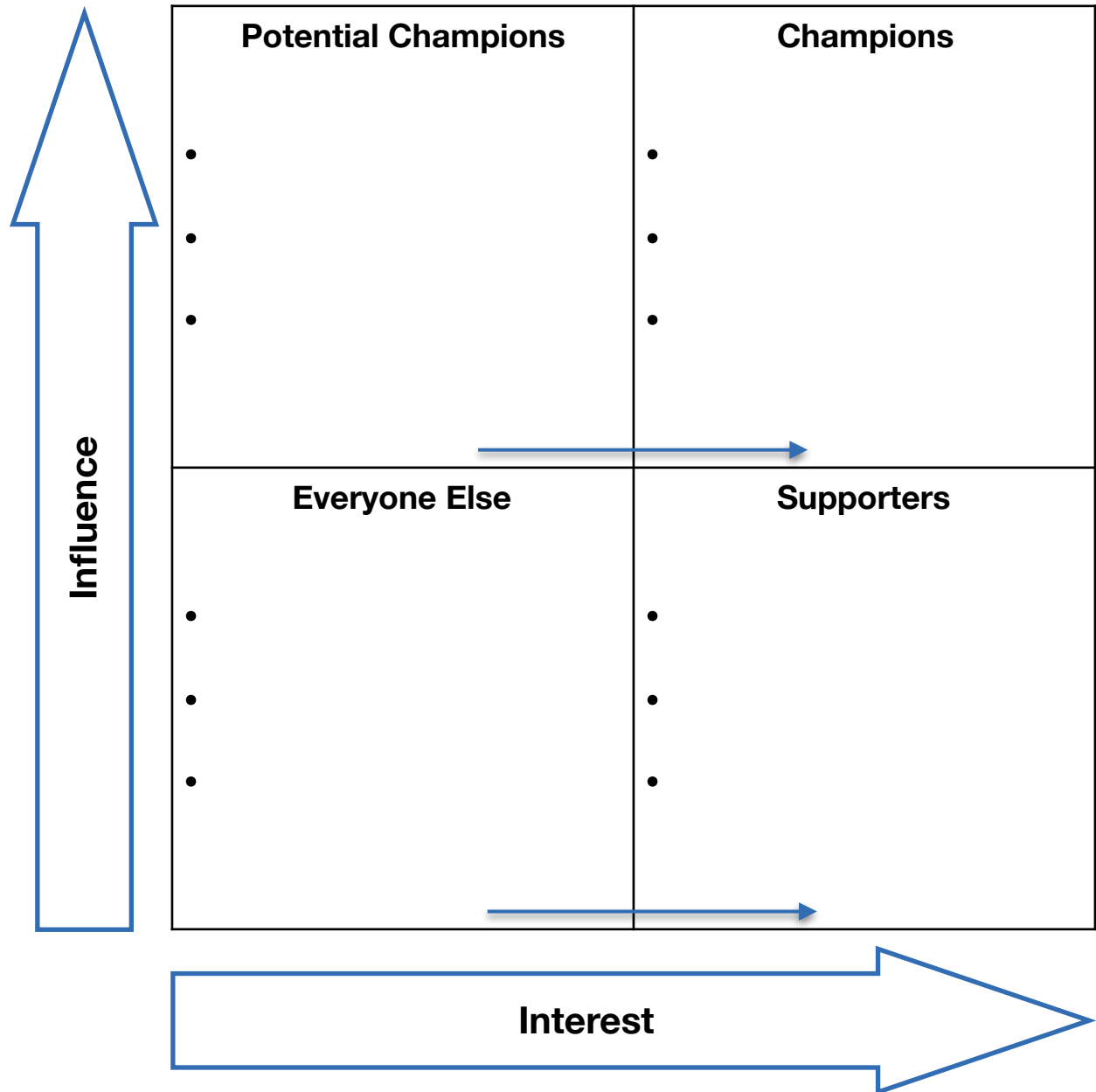
## ASPIRATIONS

- What are we passionate about?
- What are our members passionate about?
- Who are we? Who do we want to be?

## RESULTS

- What resources do we need?
- How will we know we are succeeding?
- What metrics would indicate we are on track?

# Stakeholder Worksheet



# Are We Doing Our Best Work?

We do our Best Work when we leverage our strengths and resources to effect meaningful change in the careers and lives of those we serve.



Explore these questions in order to align Intention, Direction, and Action.



- **WHAT** are we trying to do?
- **WHY** are we trying to do that?
- *If we are successful, will we effect meaningful change?*



- **WHERE** are we now and where do we want to be?
- **WHO** is accountable?



- **HOW** will we get there?

# 10 Paths to Strategic Planning Failure

1. Same group, same location, same process - year after year.
2. Make it boring and painful.
3. Approach strategic planning as a single, annual event.
4. Hold the annual planning session after budget approval.
5. Do not ask for input from anyone outside the Board of Directors.
6. Be sure to include a few “pet projects.”
7. Once approved, the plan is set in stone.
8. Do not include staff in the planning process.
9. Do not measure and report progress regularly.
10. Place an emphasis on weaknesses and threats.

## Evan Fuchs ABR, CRS, GRI, RENE, RSPS, SRS, e-PRO



Hi, I'm Evan. I train and speak nationally on leadership, sales, strategic planning and team-building. I love collaborating with passionate professionals who aspire to achieve their best work.

My keynotes, workshops, and courses inspire action by empowering individuals and teams to connect their goals with their passions. I focus on real-life application based on experience, not just theory, so everyone is guaranteed to leave with actionable takeaways.

### COURSES, KEYNOTES, WORKSHOPS

Leadership Training  
Strategic Planning  
Team Building  
AE/Staff Programs  
Buyer Consultations  
Business Planning & Systems  
Communication & DISC

### CONTINUING EDUCATION

#### CURRICULUM DEVELOPMENT

#### DESIGNATIONS & CERTIFICATIONS

ABR: Accredited Buyer Representative  
CRB: Certified Residential Brokerage  
GRI: Graduate REALTOR® Institute  
RENE: Real Estate Negotiation Expert  
SRS: Seller Representative Specialist

*For a complete list of keynotes, workshops, and courses visit [EvanFuchs.com](http://EvanFuchs.com)*

*A little more about me:* I am an active Broker/Owner with 21 years experience, Past State President, 2018 NAR Professional Development Committee Chair and a John Maxwell Certified Trainer. I present designation and certification courses including ABR, CRB, GRI, RENE, and SRS, as well as custom programs, such as the Arizona REALTORS® Leadership Training Academy. I am a proud husband with two beautiful girls, an accomplished concert goer, and a lifetime learner.

*How can I help you?*

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