

Strategic Planning

01 Overview

Sarah Morgan specialises in helping professional services and advisory businesses such as accountants, lawyers, healthcare, financial advisors and consultants achieve their growth potential through their people.

Our team-building strategy session is designed to identify your leaders, pinpoint your gaps for improvement and leave you with a vision and culture plan for your organisation.

Growth and scale are important in your business and the most obvious starting point is through your people.

02 Objective

At the end of this session, your organisation's vision and values will be incorporated into the understanding of your team members.

Your team will be motivated to align their own personal goals to the business goals and vision.

Your team will have the tools to better communicate, display leadership, and encounter personal responsibility to achieve the company goals.

03 Facilitation

Sarah Morgan facilitates workshops that are designed to understand and reach your organisations desired outcome. We will have your objective firm in mind in preparation for the meeting.

We ensure that the outcomes, required actions, and questions are properly recorded, actioned, and appropriately dealt with. Afterward, we look in more detail at results and what important outcomes have been raised.

Learning Outcomes

- Clear desired outcome and process
- Group generated ideas and solutions
- Brainstorming sessions
- Maintaining the group's focus
- Focus on the positive outcomes



Ideal for Organisations

- Want to design the processes with the input of the team
- Want to build a high performing organisational culture
- Want to strengthen their teams' relationships
- Work more cohesively



Timeline

01

First objective is to do your company training and develop needs analysis. We will take the first steps for this during the discovery session and materialise it during the actual strategy work.

PROJECTED DURATION:
1 - 2 hours

02

Secondly, we will facilitate the required workshop, surveys and programs for your staff to reach your organisation's objectives.

PROJECTED DURATION:
1 to 2 day workshop

03

Finally, we make further recommendations on the best way forward to reach your objectives, this can be implementing the findings and actioning the strategic plan.

PROJECTED DURATION:
1 -2 Hours

Deliverables



TEAM PROCESS

Design a process with the input of the team



HIGH PERFORMANCE

Build a high performing organisational culture



STRONGER TEAM

Strengthen their teams' relationships



TEAM WORK

Provide a more cohesive working team

TERMS OF PAYMENT

Payments for projects are to be made before the project starts. We will provide you with the payment details as we begin the project. We also offer payment plans for each milestones separately - meaning your upfront investment amount will be smaller. Please contact us for details!

Total Investment:

Excluding GST from

\$ 1500 For 6 people

Additional

\$ 150 Per person