**Strategic Planning for Teams**

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| **Key Questions (in order)** | The Product | Notes | Related Questions to Ask |
| **Why does the team exist?** | Team mission statement |  | * How well do other team and individuals outside of this team understand why this team exists? * How often do you come back to this with your team to ensure engagement and purpose? |
| **What is the team’s connection to the organization’s strategic priorities?** | Team priorities |  | * Do key stakeholders agree on priorities? * How does this team seek feedback from others on priorities? * How are priorities communicated out to others in the organization? |
| **What will you cause to happen this year (or other defined time period)?** | Team goals |  | * What key metrics will you commit to? * What data will you collect? * How often does that data get reviewed with team? |
| **How will you cause that to happen?** | * Team strategies * Major milestones * Calendar of projects * Team budget |  | * How frequently do you data dive in order to adjust strategies? * How often does the team review the yearly calendar / “zoom out” to identify risks to milestones and to adjust individual priorities? * How well does your budget support your strategies? |
| **What role does everyone on the team plan relative to each other to achieve those goals?** | * Roles & responsibilities map (who’s who on the team) * HIRs for each role |  | * Does the team know what each other’s HIRs are? * How often does the team need to meet together in order to achieve goals? * How can the team support each other in HIRs? |
| **What is each team member responsible for during each review period?** | * Year-at-a-Glance * Semester deliverables |  | * What is each person taking the lead on? Involved with / supporting? |
| **How are team members spending their time? How are you spending your time?** | * Monthly priority plans * Outlook calendar by week |  | * What is the best use of time during X period for each person on the team? * What should check-ins look like during this period? |

**Other questions to consider and plan for:**

* How does the team deal w/ interruptions and unexpected demands on their time?
* How does the team build personal connection?
* How does the team celebrate success?