

Welcome!

As you enter the room, please grab one card from the Deck of Cards located at the front of the room.

The cards will pick your seating table for you – please join the group at the table number that matches your card.

Hold on to your card for rest of the session!

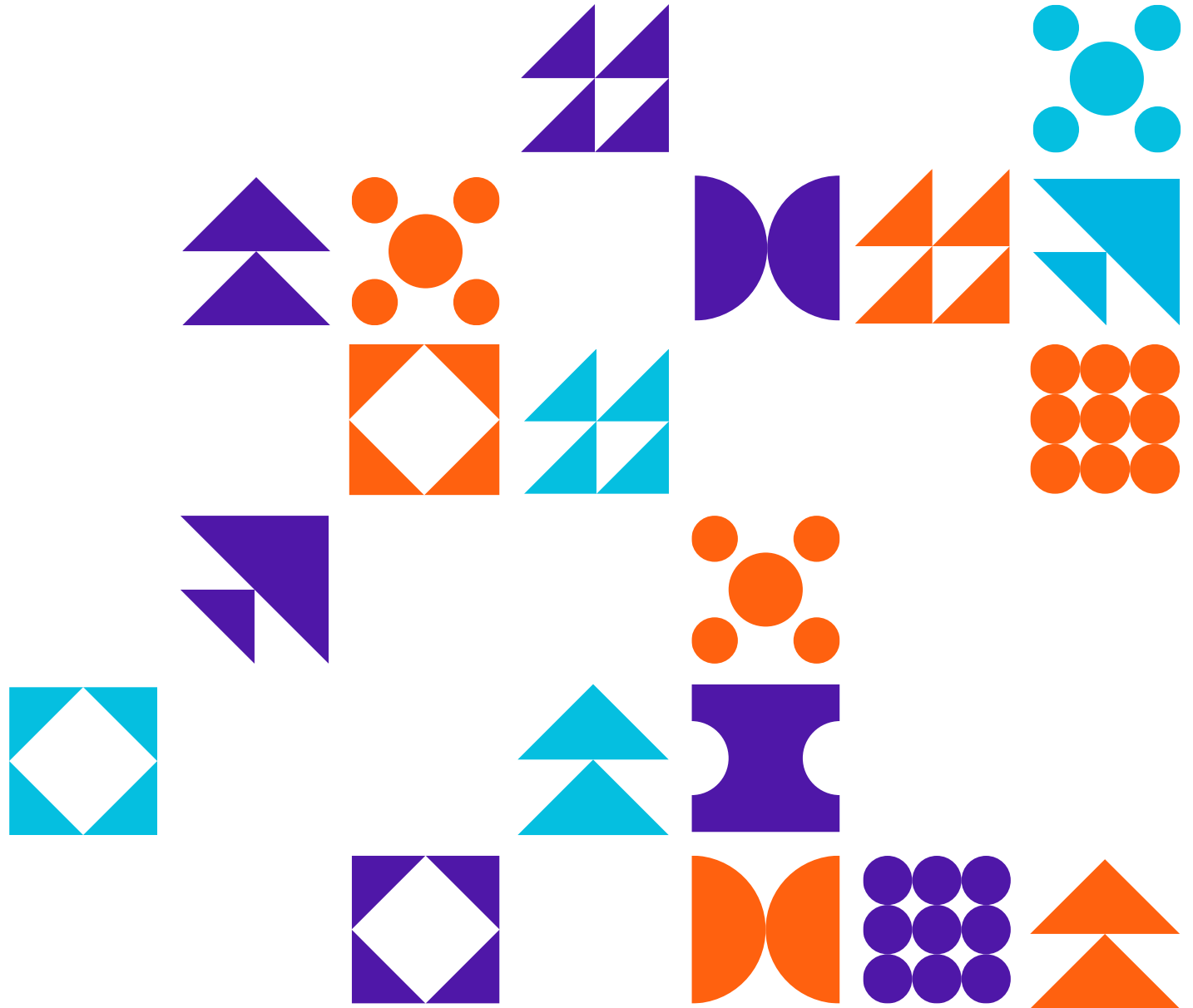


SYNERGIZED SUCCESS

A Workshop on Strategic Planning

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Date: May 18, 2024



Discussion Topics

Conversational intimacy involves efforts by leaders to create and maintain a close connection with employees at every level of their company. And it requires leaders to be honest and authentic, especially when it comes to sharing bad news or addressing difficult topics.

SOURCE: [HTTPS://HBR.ORG/2013/04/TURNAROUNDS-TURN-ON-CONVERSATI](https://hbr.org/2013/04/turnarounds-turn-on-conversati)

“Passion + Consistency = Success”— Lilla Liptak

1

5 min

Introduction to the Workshop

2

10 min

Exercise 1 – Thought Diversity
8 min - brainstorming exercise
2 min - discussions

3

15 min

Exercise 2 - Group Decision Making
9 min - group activity
6 min - discussions

4

16 min

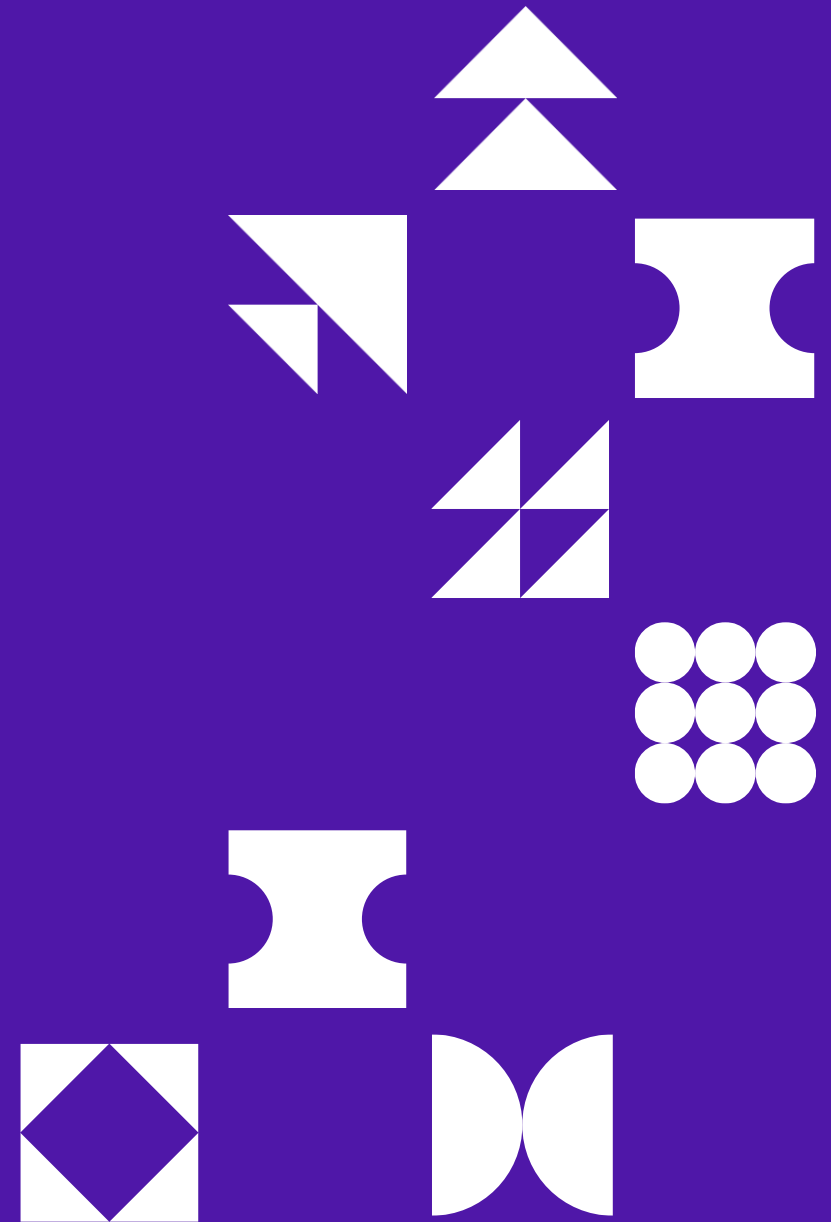
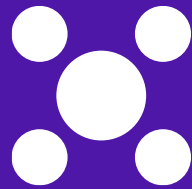
Exercise 3 – Actionable Plan
10 min - group activity
4 min - team presentations

5

4 min

Recap & Closing

WORKSHOP INTRODUCTIONS



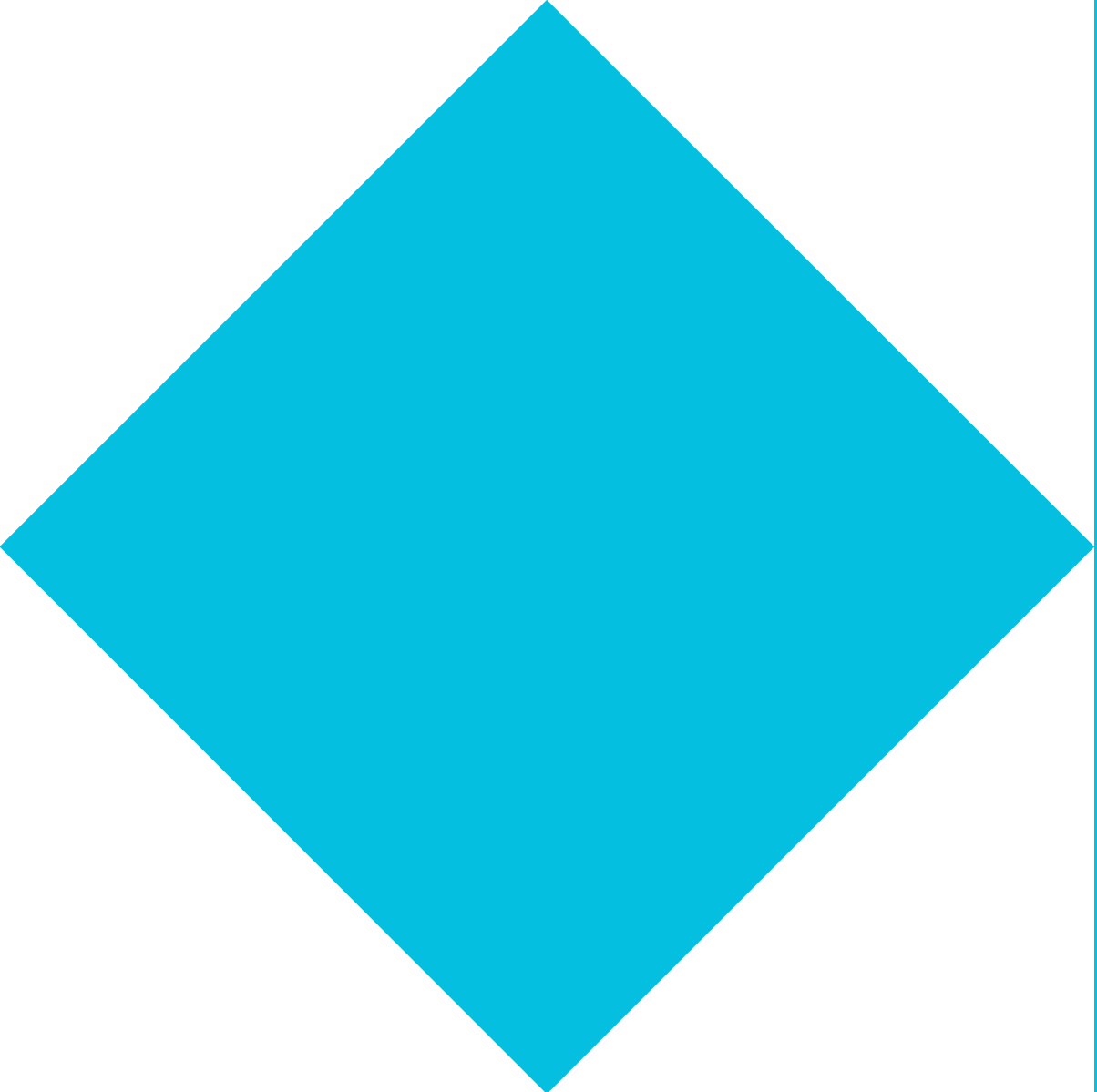
What are Strategic Workshops?

- Meetings in a Relaxed and Safe Environment
 - Ground Rules are Necessary
 - All Input is Welcome
 - No Such Thing as a Stupid Questions
- Target to Increase Communications and Collaboration
 - Bring Participants from Different Teams & Backgrounds
 - This is not an “Individual” Assignment & There are no Winners
 - Silos are not Welcome
- Ultimate Objective is a List of Actionable & Achievable Goals
 - Unachievable Goals Devalue Strategic Workshops
 - Actionable Goals Increase Buy-In and Overall Motivation for Success

Ground Rules

- **Please Respect Time Blocks:** this is a fast-paced workshop and for us to reach the end goal means we need to stick with our agenda.
- **Follow the Voice of the Facilitator:** Exercises can become very engaging so if you notice the call, encourage your group to stop working.
- **Speak Up & Participate:** Outside of this room, you may be an introvert but this workshop is your opportunity to share your ideas. You will have more than one way to do this, and it may not even include talking to others!
- **Respect Your Colleagues:** All opinions are valid. If you disagree with something, ok to vocalize it but do not turn it into a debate.
- **Stupid Question Policy:** For the sake of time today, your questions may be deferred to be answered later. Understand that this is for the timekeeping rule (#1 above) and not because you asked a question that is not worth entertaining.
- **Do Not Exchange your Card:** Seating is randomized for the purposes of this workshop with its goal to encourage diversity of thought and experience
- **Have Fun & Network:** Get out your LinkedIn QR codes and connect with your group members. You never know that something you say or do during this workshop may be an AHA moment for someone else to recognize your talents.

TODAY'S SESSION SCENARIO



Using PMI's Culture Values, Establish an Actionable & Achievable Plan Addressing Volunteer Engagement Concerns

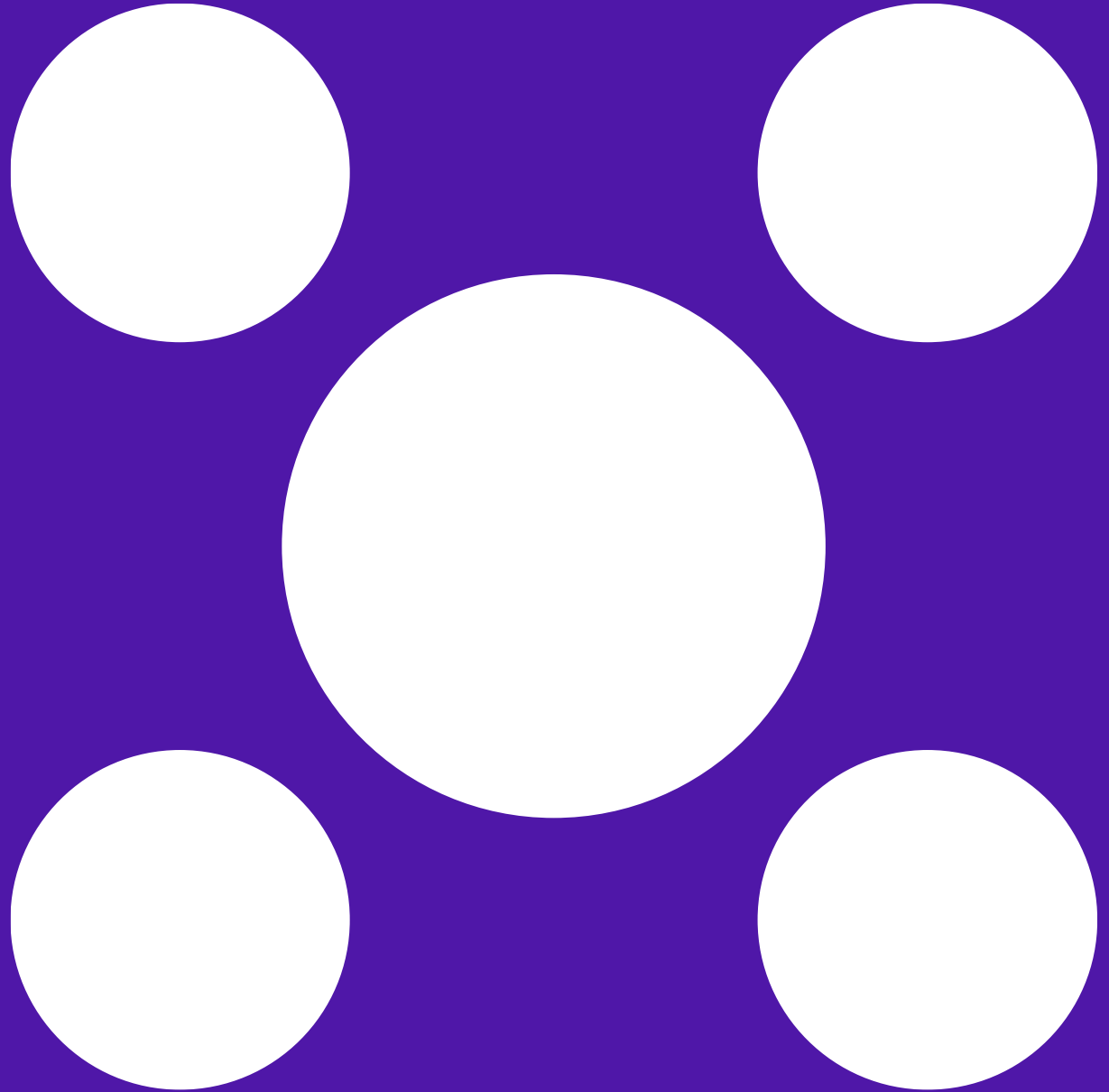
Scenario:

You are the Chapter Leader supporting the Volunteer Activities. Recently, you have noticed that your new volunteers are not sticking around, and existing volunteers are no longer as engaged as they have been in the past. Yes, it could be the summer season, and everyone is ready for vacation, but something is not adding up. Something needs to be done so the Chapter can continue running smoothly.

Workshop Steps:

1. Review the PMI Culture Values and brainstorm on possible ways to increase engagement
2. Prioritize the best ideas for three specific issues that were identified during exit interviews
3. Identify the top 4 ideas that can be turned into an action plan

EXERCISE 1



EXERCISE 1 Instructions

- Use the Sticky Notes at your table and write down ideas to solve the Volunteer Engagement problem that are aligned with the PMI Culture Value assigned to your Table.
- You can work on this as individuals or discuss briefly as you write.
- Each team member should target writing 3-5 ideas.
- Ideas do not have to be unique but don't duplicate just to hit your target.
- Once you have written down your ideas, put them on the designated wall space.
- Note that each Culture Value has a different color sticky note – please do not share with other tables.
- You have **8 minutes** to complete this activity.

PMI Culture Value Assignments

Team A

Make It Easy

We are easy to deal with.

When things slow us down, we find a better way.

We prioritize the impact that matters most and take the most direct route to it.

Team 2

Aim Higher

We set the standard in top quality work to create the greatest impact for the PMI community.

We lead the way by thinking long-term and acting in the short-term.

We fearlessly take ownership of what we do, knowing every action counts.

Team 3

Be Welcoming

We create genuine belonging for all, because our differences make us stronger.

We act with humanity, showing care, empathy and respect for others' needs.

We assume good intent and seek to understand, not judge.

Team 4

Embrace Curiosity

We are always seeking ways to better serve the PMI community.

We see challenges as opportunities to innovate, and take them.

We feel able to fail fast in order to get it right.

Team 5

Together We Can

We build deep, trusting relationships that help us work towards our mission together.

We use our shared purpose to unite us as a community and drive us forward to create impact.

We act in alignment with our global goals, while being empowered to deliver locally.

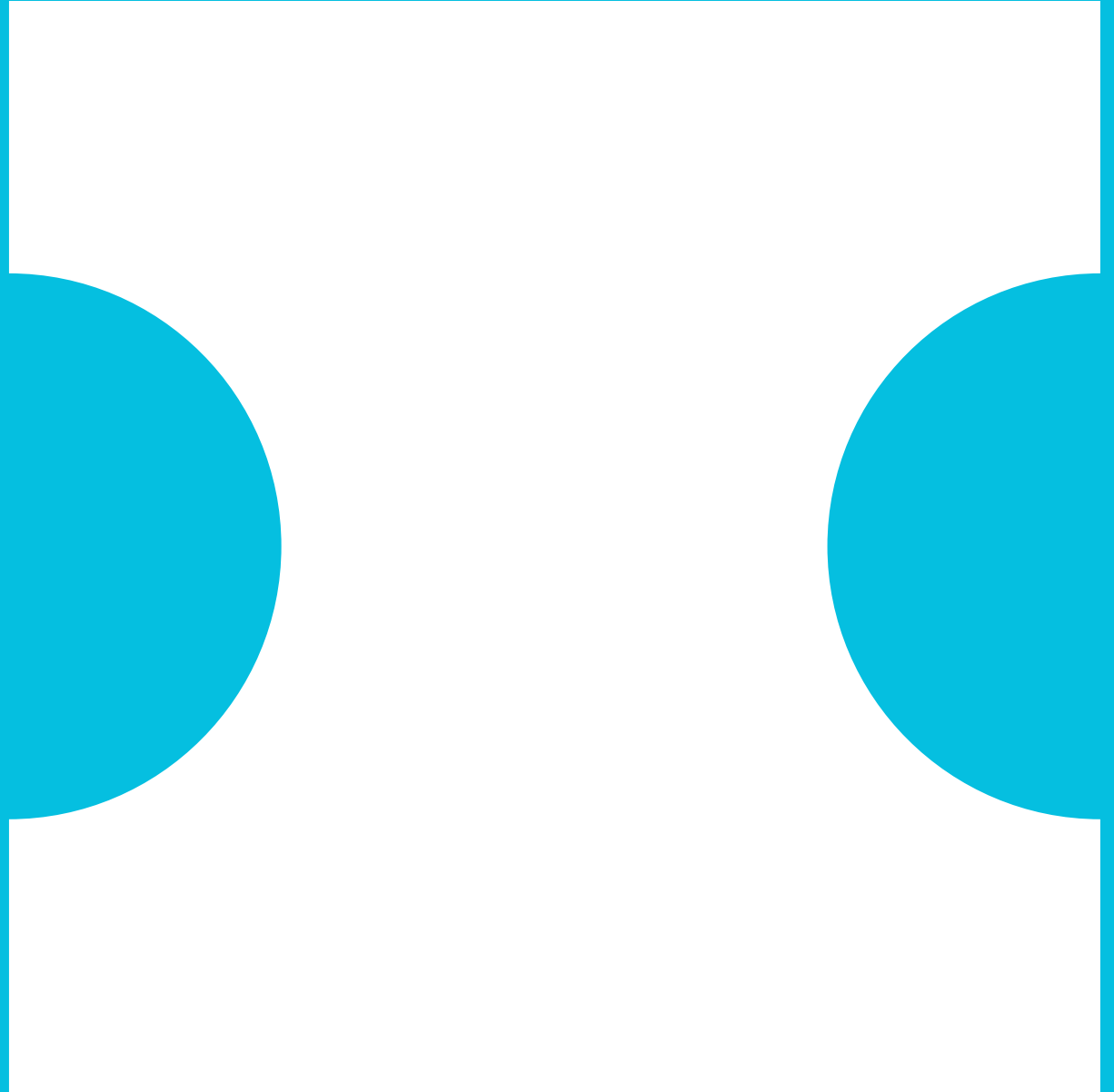
EXERCISE 1 Discussions

- Did you feel like you were able to bring your ideas to the table?
- Just by reading what was written on a sticky note,
Did you dismiss someone else's idea
OR felt like your idea got dismissed
OR observed someone's idea get dismissed?
- In the business world, do you see this happening often and why do think that is so?
(A shared idea gets dismissed without any discussion)

EXERCISE 2

SEAT SWITCH!

MOVE TO THE TABLE
THAT MATCHES THE
SHAPE ON YOUR
CARD.



EXERCISE 2: Exit Interviews Scenario

The Director of Volunteer Engagement found these three main findings during Exit Interviews that could be addressed by the Chapter. To further define the scope, the Director also excluded presenting any reasons that were personal to the volunteer such as a major life event or change.

Scenarios:

New Volunteers were onboarded correctly, and their roles were assigned as discussed. However, they complained about lack of training or system access to do their work assigned.

The team leader was not present or did not make time to provide direction. There was no communication among the volunteer team and both new & existing volunteers felt a void or level of dissatisfaction in participating on the team.

Existing Volunteers were starting to feel excluded and that they did not belong with the group. New Volunteers were being given more time and attention, as expected, for the training but that left the existing volunteers in the dark.

EXERCISE 2 Instructions

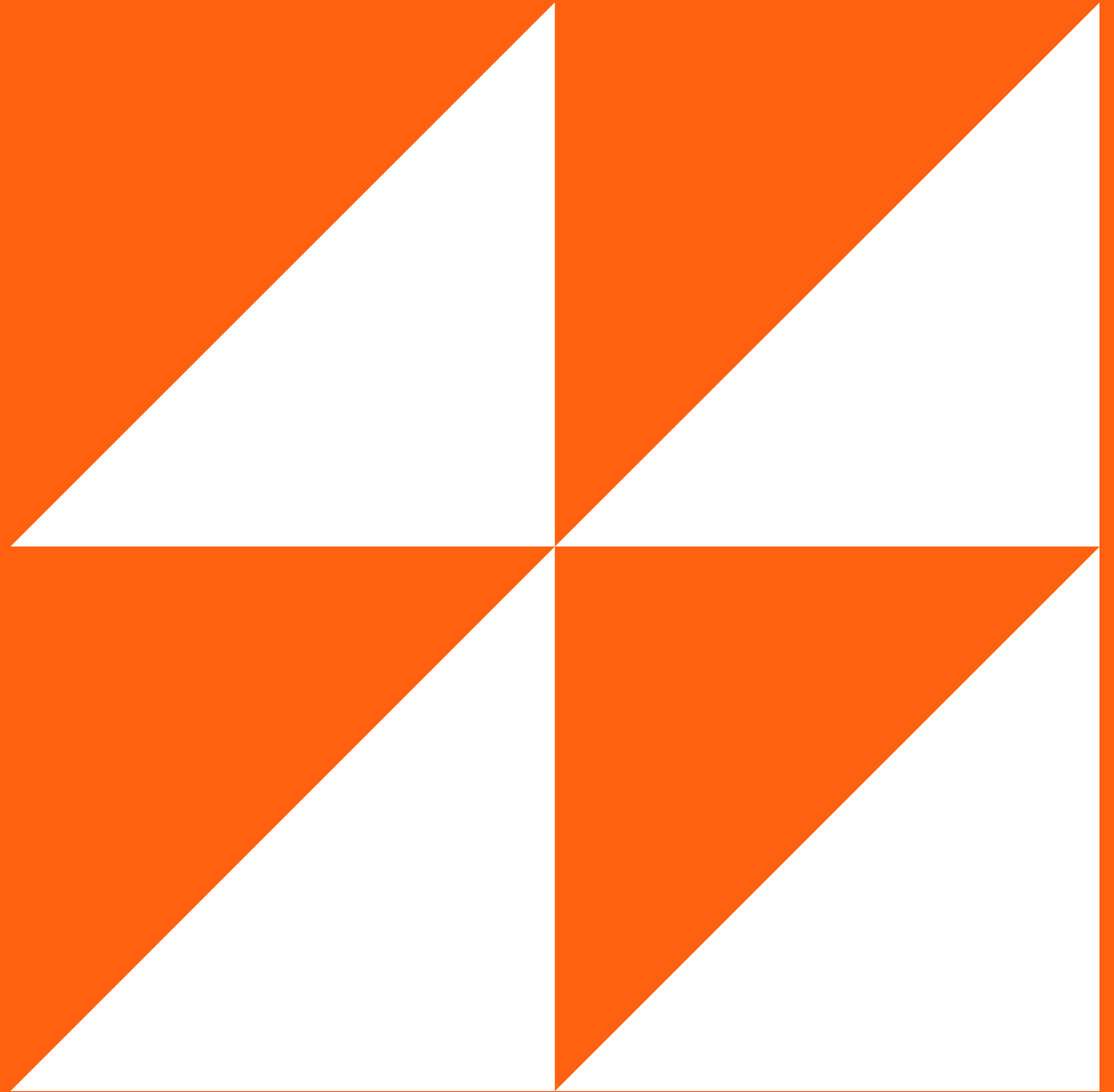
- As a group, walk over to each PMI Culture Value chart and decide on ONE sticky note that would have the most impactful change for the three scenarios.
- Encourage everyone to discuss and provide feedback. However, how you make the decision is up to you
 - You can vote for the best solution
 - You can designate a CEO to make a decision
 - You can split up and go to different Culture Value boards
- By the end of the time, you should have brought back a total of 5 (and only 5) sticky notes to your table. Each sticky note should be a different color.
- Remember that other groups are **SIMULTANEOUSLY** doing this exercise as well so you will have competition!
- Designate a Spokesperson for your table to answer discussion questions afterwards
- You have **9 minutes** to complete this activity.

EXERCISE 2 Discussions

- What was your Decision-Making process (Vote, CEO, or Divide & Conquer)? What were the Pros and Cons.
- Were you inclined to pick the idea that you wrote in Exercise 1?
- Was there any pressure in gaining the “Competitive Edge” during the decision-making process? What was your method?
 - Educated Decision (did you read them all?)
 - Educated Guess (did you read a few and felt the one you picked was correct?)
 - Random Pick (did you just take the first or second one you read because it made sense?)
- Why were you selected to be the Spokesperson?

EXERCISE 3

STAY WHERE YOU ARE!



EXERCISE 3 Instructions

- Since Volunteers are the life of our organization, fixing the problem on hand is an immediate need.
- Working as a team, discuss the 5 ideas on your table and identify the SINGLE MOST IMPACTFUL idea to address the Volunteer Engagement problem.
- For that one idea, create a SMART goal that the Chapter can implement for maximum success.
- You have **10 minutes** to complete this activity.
- After the 10 minutes, each team will present their SMART Goal.

S	Specific
M	Measurable
A	Achievable
R	Relevant
T	Time-based

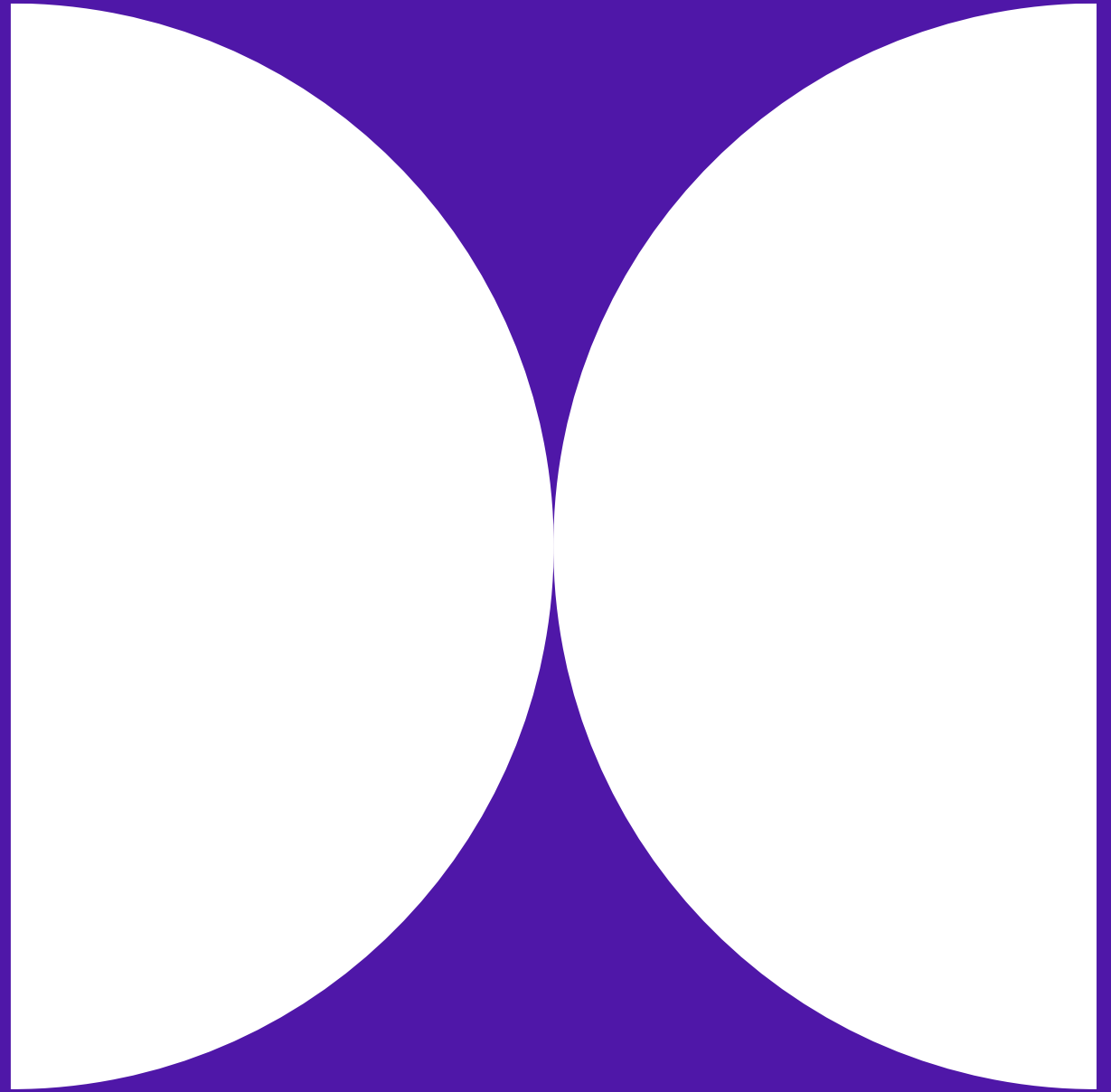
EXERCISE 3 Discussions

Why do you think someone else's SMART Goal was effective and how can you improve yours?

Exercise 2 was competitive in nature, but Exercise 3 identified few different SMART Goals that you can take this back and implement it right away. Can you share an example on what you can implement at your Chapter as soon as you get back?

Note: For effective Strategic Workshops, ideally, you want to create goals for at least 3 of your top 5 ideas, but we only used the top one in our workshop due to time restraints.

CLOSING



Lessons Learned

1. Strategy Workshops are meant to be **collaborative**. As a leader, you are used to making the calls and often your instincts will lead you to the best response. However, that does not mean that others don't have better ideas. Allow honest and authentic conversations while you are at it and many of your most difficult problems may just need an investment of 50 minutes.
2. Make new friends by surrounding yourself with **new ideas & perspectives**.
3. Break down silos by encouraging team members from other areas to **share** their thoughts and to provide input on challenges you may be facing.
4. Don't be afraid of some **healthy competition** – you can learn a lot from their successes and failures. The perception that you lose by not winning needs to change for progress to happen. By engaging with the market trend or simply focusing on **continuous improvement** will give you agility to respond to evolving challenges.
5. Ask **WHY**. It gives you a lot more insight than you may have asked for, but **knowledge is power**.

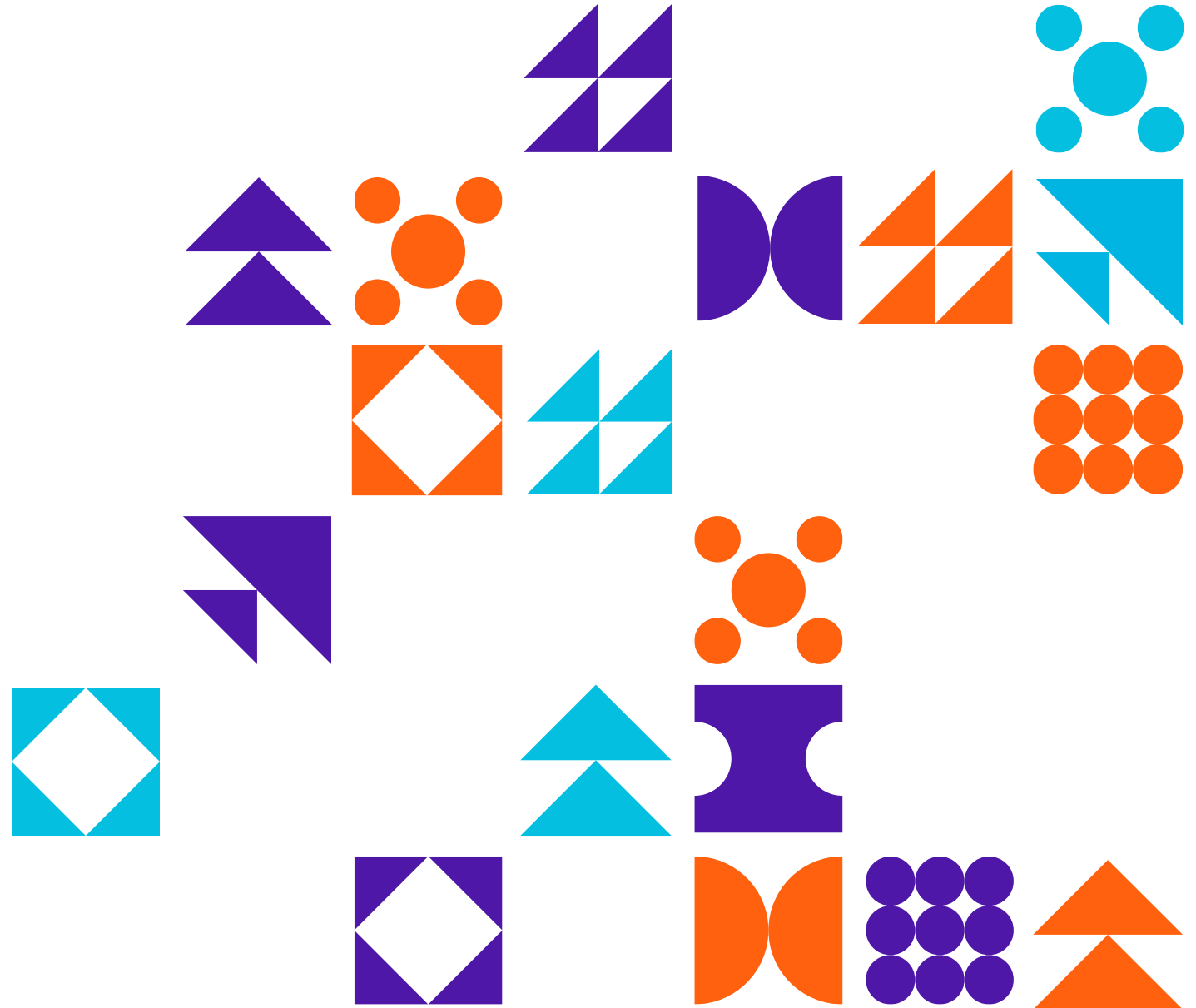


THANK YOU!

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Connect with me on LinkedIn!



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