



From Bored to Engaged: Energizing Your Board For an Impactful Strategic Planning Process

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Introduction



— Prior to Beginning

Why Board Engagement Matters

- Enhances trust, ownership, and alignment
- Empowers Board members when they understand their role in shaping the future
- Engaged Board members will be your best ambassadors, advocates, and supporters



— Prior to Beginning

Prepare a Foundation

Establish a culture of engagement within your Board well before starting any strategic planning process to lay the groundwork for success.

- Clarify what active engagement means for your Board in a written set of expectations
- Streamline meetings
- Create an inclusive environment
- Evaluate Board performance regularly



— Prior to Beginning

Establish a Framework

Identify the purpose of developing your strategic plan with the help of key stakeholders. Clearly define the process that will be utilized and determine a timeline for major milestones.



During the Process

Communicate Regularly

Set clear expectations for the Board:

- What the process will be and a timeline
- What their roles will be
- Expected outcomes

Identify members to serve as internal leaders.



During the Process

Create Opportunities to Engage

After a rough draft of the plan has been established, schedule a Board retreat dedicated to discussing the strategic plan where members can achieve consensus and feel confident to approve the plan.

- Obtain and incorporate relevant draft plan feedback into final version.



Monitor and Evaluate

- Designate staff and board members to champion and lead/operationalize specific segments of the plan.
- Determine regular intervals at which the Board will be updated and can assess progress. Communicate successes!
- Stay flexible and pivot to accommodate changes in industry landscape, economic factors, or other variables that change over the course of the plan.



Following Through

Common Pitfalls to Avoid

- Lack of clarity on roles and responsibilities.
- Insufficient communication throughout the process.
- Overloading the Board with too much detail or too little ownership.
- Failing to celebrate and reinforce the plan's successes.



Closing Thoughts

- Engagement starts early: lay the groundwork ahead of time.
- Involve and inspire: show impact.
- Keep momentum alive: regular updates and celebrations sustain Board engagement.





Thank You

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