



Strategic Goals Workshop

Workshop Purpose

To help the agency clarify and align on its short, medium and long-term goals – and to identify the operational structures and systems required to support them.

This is a fast-paced session designed to make the most of having senior people together in one place. Given how rare it is to align leadership in this way, the workshop focuses on setting high-level direction and defining the agency's big goals.

The workshop balances strategic ambition with practical delivery. It's not just about what the agency wants to achieve, but how it will get there operationally – and how to stay on track.

Follow-up meetings should be booked in advance during the workshop to keep momentum going. The delivery plan will be developed by working back from the agreed launch date or strategic milestones.

It is the role of operations to maintain that momentum – tracking progress, removing delivery barriers, and ensuring the necessary systems, structures and behaviours are in place.

Who Should Attend

- CEO / Founder / MD
- Heads of Department
- Optional: Emerging leaders or high-potential team members for future-proofing perspective

Ideal group size: 6-10 participants

Facilitator: Neutral external consultant or experienced internal strategist, or the CEO if they are comfortable stepping into a facilitation role.

Important: This workshop should be held externally and away from the office to allow uninterrupted focus and to encourage honest, strategic thinking in a neutral environment.

Workshop Duration

Full day (6.5 hours excluding breaks)

Includes multiple working sessions, debriefs and alignment moments. Breaks are placed to maintain energy and create space for informal discussion.

Agenda & Detail

Session 1 – Welcome & Scene Setting (15 mins)

- Purpose of the day: Clarify the dual focus – setting goals and designing operations to deliver them
 - Principles: Honesty, challenge, open-minded, collaboration, forward-focus
 - Outputs: Align expectations and define what a successful day looks like
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Session 2 – Where Are We Now? (45 mins)

Objective: Understand the current state of the agency from a strategic and operational lens.

Activities:

- Brief presentation from leadership on:
 - Current goals or strategy (if any)
 - Recent business performance
 - Known bottlenecks or frustrations
- Team reflection (silent first, then shared):
 - What's working well?
 - What's getting in the way?
 - Where are we over-relying on people or patchwork solutions?

Tools: SWOT / SOAR / "Start, Stop, Continue" matrix

Output: Shared understanding of current strengths, challenges, and operational pain points

Session 3 – Future Visioning (1 hour)

Objective: Articulate where the agency wants to be at different horizons – short (12 months), medium (1–3 years), long-term (3+ years).

Activities:

- Guided prompts:
 - If we were sitting here in a year, what would success look like?
 - What do we want to be known for as an agency?
 - What should our client mix, team and revenue model look like in 3 years?
 - What's our ultimate ambition or exit plan, if any?
- Breakout groups for short, medium and long-term visioning
- Playback and consolidation into group goals (growth, creative reputation, financial health, culture, client base, operational excellence)

Tools: Time Horizon Mapping

Output: Draft strategic aspirations for each time horizon

Break – 15 mins

Session 4 – Defining & Prioritising the Goals (1.5 hours)

Objective: Translate aspirations into a small number of clear, actionable goals for each time horizon.

Activities:

- Group selects top 3–4 goals per horizon
- Apply SMART criteria to make goals concrete
- Prioritise using the Impact–Effort Matrix
- Map dependencies between goals across time horizons

Tools: SMART or CLEAR goal framework, Impact–Effort Matrix

Output: A prioritised, realistic set of strategic goals for each timeframe

Lunch – 45 mins

Session 5 – Operational Alignment (1.5 hours)

Objective: Identify what operational enablers are required to support delivery of the goals.

Activities: For each goal:

- Identify what needs to be true operationally for success:
 - Systems and tools (e.g. project management, CRM, forecasting)
 - Processes (e.g. briefs, resourcing, reporting, QA)
 - People and roles (capacity, capability, gaps)
 - Metrics and reporting structures
 - Financial controls (budgeting, tracking, profitability)

Use the “Red Thread” exercise:

If this goal is achieved, what operational thread needs to run through everything to hold it together?

Surface current gaps or risks. Define minimum viable ops for each timeframe.

Tools: Operational Enablement Canvas, Delivery Risk Radar

Output: Operational map showing how delivery mechanisms align with strategic ambition

Break – 15 mins

Session 6 – Staying on Track (45 mins)

Objective: Design rhythms, tools and accountability structures to ensure progress continues beyond the workshop.

Activities:

- Define success metrics and early indicators for each goal
- Assign ownership at the goal and enabler level
- Build a quarterly review rhythm into leadership or ops team cadence
- Identify decision points – when to stick, pivot, or escalate
- Set up feedback loops to ensure strategy stays grounded

Questions to answer:

- How will we know we're making progress?
- Who will flag if we're going off-track?
- What decisions do we want to make in real time, not in hindsight?

Tools: RACI, Roadmap Drafting

Output: Delivery framework – owners, milestones, and a quarterly rhythm

The senior attendees of the workshop are expected to delegate deeper dive work to the appropriate teams or functional leads. These follow-up sessions will explore challenges, solutions and resource plans in more detail.

Session 7 – Wrap-Up & Commitment (30 mins)

Activities:

- Recap the strategic goals and aligned operational focus
- Ask each leader to state one commitment they're making to support delivery
- Agree on next steps:
 - Workshop output document within 5 working days
 - Accountability check-in within 4 weeks
 - Follow-up planning sessions pre-booked to maintain momentum
 - Optional: Follow-up half-day workshop in 3 months to assess traction

Output: Shared commitment and clear next steps to carry momentum forward

Inputs Required Pre-Workshop

- Agency financials (last 12 months revenue/profitability)
 - Org chart and team roles
 - Current strategy decks or roadmaps (if any)
 - Client list and income breakdown
 - Current challenges from each function lead (optional pre-survey)
 - Existing tools, processes or systems in use
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Outputs Delivered Post-Workshop

- Summary document including:
 - Strategic goals (short, medium, long)
 - Operational enablers
 - Key risks and gaps
 - Ownership and success metrics
 - Agreed next steps
 - Strategic Goals & Ops Tracker (optional spreadsheet or dashboard format)
 - Meeting rhythm and review plan
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Ensuring Momentum

To prevent drift or inertia:

- Build accountability into existing leadership or ops meetings
- Use visibility tools like a public goal tracker or scorecard
- Nominate an owner (or small task force) to maintain traction
- Review monthly, adjust quarterly, reset annually
- Reinforce narrative – regularly remind the agency why these goals matter