

# EXERCISE: STRATEGIC DESIGN PROCESS BUILDER (PT. II)

STEP 2: EVALUATE THE PAST		
MEETING DETAILS	When will the meeting be held?	
	Who will attend?	
	What information will you include?	
	For how long?	
SOURCE 1: Financial Data	Who will synthesize and present the relevant information?	
	How long should their presentation be?	
	By when should they be ready to present?	
SOURCE 2: Employee Survey	Who will synthesize and present the relevant information?	
	How long should their presentation be?	
	By when should they be ready to present?	
SOURCE 3: Key Initiatives and Goals	Who will synthesize and present the relevant information?	
	How long should their presentation be?	
	By when should they be ready to present?	

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SAMPLE

STEP 2: EVALUATE THE PAST		
MEETING DETAILS	When will the meeting be held?	4/8/2022
	Who will attend?	The executive team and all EAs
	What information will you include?	Andrea (EA)
	For how long?	4 hours
SOURCE 1: Financial Data	Who will synthesize and present the relevant information?	Marcus (CFO)
	How long should their presentation be?	15-20 min
	By when should they be ready to present?	4/6/2022
SOURCE 2: Employee Survey	Who will synthesize and present the relevant information?	Leah (COO)
	How long should their presentation be?	15-20 min
	By when should they be ready to present?	4/6/2022
SOURCE 3: Key Initiatives and Goals	Who will synthesize and present the relevant information?	The executive team
	How long should their presentation be?	3 min. per goal
	By when should they be ready to present?	4/6/2022