

# Strategic Planning Summit (SPS)

## Frequently Asked Questions (FAQ)

### General Questions

**Q. How might COVID-19 impact the summit?**

**A.** The format of the summit was specifically designed to be remote in light of the social distancing and self-quarantine guidelines currently recommended by the CDC. We are combining our proven expertise in leading strategic planning retreats with our in-depth experience in facilitating remote engagements to make this important process accessible in a time where it's more crucial than ever to be engaging in.

**Q. Why is the summit being held before the new July 15<sup>th</sup> tax deadline?**

**A.** We believe the rate of disruption currently happening requires firms to evaluate their strategies as soon as possible. Waiting until after the extended tax deadline, or the pandemic improves, puts most firms at risk of client attrition and/or critical operational challenges.

**Q. What is your refund policy?**

**A.** Because the summit is open to a limited number of firms and we begin preparation internally as soon as a firm signs up to participate, the cost to participate in the summit is nonrefundable. In the event that the required minimum number of participating firms isn't met and we need to cancel the summit, all registered firms will receive a full refund.

**Q. What if we want additional help with our strategic priorities?**

**A.** We will be offering a follow up coaching package to each firm participating in the summit to help further your discussions or support your agreed-upon initiatives. We will provide additional details about this package during the summit.

**Q. Who do I contact for further questions?**

**A.** Tamera Loerzel at [tamera@convergencecoaching.com](mailto:tamera@convergencecoaching.com).

### Pre-Planning Survey

**Q. Does my whole firm get to participate in the pre-planning survey?**

**A.** You may determine who and how many team members complete the pre-planning survey. All questions in the pre-planning survey will be close ended, with the exception of an "other" option that respondents may include an open-ended comment. This helps you and us quickly get a "temperature" for how your people feel about the various topics we'll be exploring together and give you some guidance on direction and decisions as you identify your top focal areas.

You are welcome to ask your entire firm to complete the survey, or you may decide to identify a cross-section of your people to complete it and help reduce the effort of following up to ensure you collect the desired responses. If you pursue a narrower participation group, you should include all team members who will be participating in the Strategic Planning Summit, and we suggest it include representation from all service lines or departments as well as genders, generations, cultures and titles in the firm. We also encourage that you get as many of your future leaders to participate as possible.

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**Q. What will the questions cover? Can we modify the questions in the survey?**

**A.** The survey will include questions about your firm’s opportunities and challenges, considerations around your client experience, service offerings, technology, talent and leadership, internal collaboration and remote work, and more. All firms will be provided a sample of the survey questions ahead of sending out their survey invitations, but the survey questions cannot be modified as they were strategically designed to help provide you with the best summit experience possible.

**Q. Is participation in the pre-planning survey anonymous?**

**A.** We ask for first and last names of participants, but the final results provided to your firm will not include attribution. We ask for respondent names so that we can provide you with updates on who has participated, and you can send reminders to those remaining.

You will be supplied with the closed-ended responses for each questions and the full responses provided in any “Other” answer choices selected and filled out by a participant, however, we will not associate any individual names to them.

The survey invitation text will include this information so that participants are aware that their responses are “confidential” but not anonymous and that no individual response will be attributed to any individual names.

**Q. How does the survey process work? Does our firm distribute the survey or will ConvergenceCoaching?**

**A.** We will create a separate survey for each participating firm in our SurveyMonkey platform. Each participating firm will be responsible for sending out the invitations to participate to your selected team members and sending reminders as needed.

We will provide your firm with your unique survey link, a sample of the survey questions and a suggested invitation template you can use for requesting people to participate.

We will also provide a timeline for when firms should plan to send out survey invitations, when they will receive participation updates from us and when the surveys will close.

**Q. How can our firm ensure everyone we invite to participate does?**

**A.** We will send each firm two updates of who has participated (first and last names) as outlined in the pre-work timeline.

It is your firm’s choice for how you’d like to send reminders based on the participation updates. You may choose to send a “blanket” reminder to the entire group or a targeted reminder just to the remaining individuals who haven’t participated.

Once the surveys close, additional responses will not be allowed.

**Q. How will the findings be delivered to us?**

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**A.** We will export a PDF of your firm's survey results (excluding first and last names) and email the PDF to you, along with a brief bulleted summary of any insights we had reading your survey feedback. Your team should plan to read the results ahead of the summit and have the PDF on hand during the summit for referencing.

#### **Summit Format and Logistics**

**Q. Can we have more than 10 members from our firm participate?**

**A.** Participating firms will be asked to submit their list of expected participants by a certain date. After that date, we will assess how many remaining seats may be available and if applicable, will open up a specific number of additional participant spots that firms may choose to fill if desired. We will only open additional participant spots if there is an equal number available for each firm.

**Q. Who is the ideal candidate to include in our 10 participants?**

**A.** We suggest that the 10 participants from your firm include future and current leaders as well as key administrators who are critical to the future vision of your firm. This may include a combination of some or all current partners, key administrators or operational professionals and/or up-and-coming senior managers, directors, managers, etc.

**Q. What is the format of the summit?**

**A.** The summit will be held in two 2 ½ hour and one 2-hour virtual roundtables scheduled on June 24, 2020. The purpose of splitting the summit into segments is to allow participants a break and to help process information and ideas being explored.

**Q. Will I be notified of who the other participating firms are ahead of the summit?**

**A.** No. If you have a question about a particular firm, we can work with you to provide you information about that firm. After the summit, we will send the list of participating firms, including the Managing Partner of each firm and their email in case the participating firms would like to contact one another.