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COURSE BROCHURE

# Advanced Strategic Dialogue for Planning Reviews Training Course

5 – 16 July 2027
Rome

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Registered in the United Kingdom and Saudi Arabia

# Advanced Strategic Dialogue for Planning Reviews Training Course

**Ref:** 2631_100053 **Date:** 5 – 16 July 2027 **Location:** Rome **Fees:** 11100 GBP

Strategic Dialogue for Planning Reviews is a 2-week training course for directors and strategy leads who chair or present at planning reviews, and it produces a Planning Review Dialogue Playbook. As strategy cycles shorten and leadership teams carry more competing priorities, the quality of the conversation in the review room decides whether options become commitments or drift into another meeting. Jupiter Prime Training offers this course on Strategic Dialogue for Planning Reviews.

## Why Strategic Dialogue for Planning Reviews Matters Now

Three pressures shape how strategy is discussed today. Boards and executive committees expect sharper choices in less time, so a review that circles without a verdict costs momentum. Functional heads arrive with conflicting evidence and incentives, and unresolved tension resurfaces later as quiet resistance to execution. Hybrid meetings thin out the informal signals that once let a chair read the room. An organisation that handles these conversations well turns reviews into clear trade-offs, recorded owners and dated follow-ups; one that handles them badly re-litigates the same questions every quarter while targets slip and trust between functions erodes.

## Who Gains Most from Strategic Dialogue for Planning Reviews

- Strategy office leads who design review agendas and frame the choices placed before executives
- Business unit directors who defend plans, budgets and targets under challenge
- Transformation and portfolio heads who negotiate priorities across competing initiatives
- Finance and performance directors who bring variance evidence into strategic debate
- Chiefs of staff who prepare executives and convert discussion into decision records

The strongest gains come when a leadership team and the strategy office that supports it attend together, because they leave sharing one way of framing options, voicing dissent and closing reviews.

## Strategic Dialogue for Planning Reviews Capabilities

Participants practise each stage of a contested review, from shaping the question beforehand to locking the decision afterwards, and leave able to:

- Design a review agenda around decision questions rather than status updates — executive committee chairs
- Frame two or three strategic options with explicit trade-offs and evidence — board and sponsor choices
- Surface and work through disagreement without losing candour or pace — cross-functional leadership teams
- Test assumptions behind targets with structured challenge questions — planning and finance directors
- Build a decision record with owners, conditions and review triggers — strategy office follow-up
- Communicate review outcomes so that functions act on the same reading — middle managers and delivery teams

## Key Strategic Dialogue for Planning Reviews Terms

- Decision question — the single choice a review must settle, phrased so that the answer commits resources or direction.
- Option framing — presenting alternatives side by side with their costs, risks and consequences so that leaders compare like with like.
- Productive dissent — challenge voiced openly against an idea rather than a person, aimed at improving the decision before commitment.
- Assumption register — a list of the beliefs a plan depends on, each with its owner and the evidence that would overturn it.
- Decision record — a written note of what was agreed, by whom, on what conditions and when it will be revisited.
- Escalation path — the agreed route for a disagreement that cannot be closed in the room, with a deadline for resolution.

## Strategic Dialogue for Planning Reviews Day by Day

## Day 1: The Review Room as a Decision Forum

- Review Purpose Charter — Separating Decisions From Status Reporting
- Stakeholder Interest Mapping — Anticipating Positions Before the Meeting
- Power and Influence Audit — Who Shapes Outcomes Behind the Agenda
- Review Cadence Design — Matching Conversation Depth to Planning Horizon
- Failure Patterns in Reviews — Diagnosing Circular and Deferred Debates

## Day 2: Shaping the Decision Question

- Decision Question Drafting — Turning Broad Concerns Into Settleable Choices
- Issue Tree Decomposition — Breaking Strategic Problems Into Testable Parts
- Pre-Read Architecture — Giving Executives Evidence Before the Room
- Agenda Sequencing — Placing Contested Items Where Energy Is Highest
- Decision Rights Mapping — Clarifying Who Advises, Decides and Executes

## Day 3: Framing Strategic Options

- Option Set Construction — Avoiding the Single Preferred Answer Trap
- Trade-Off Tables — Comparing Cost, Risk, Timing and Capability Needs
- Reversibility Assessment — Separating One-Way From Two-Way Choices
- Scenario Stress Tests — Checking Options Against Plausible External Shifts
- Recommendation Narrative — Stating a Preferred Option and Its Conditions

## Day 4: Evidence in the Conversation

- Assumption Register Building — Exposing the Beliefs Behind Targets
- Variance Storytelling — Explaining Performance Gaps Without Defensiveness
- Evidence Quality Grading — Weighing Data, Judgement and Anecdote
- Indicator Selection for Debate — Choosing Measures That Inform the Choice
- Visual Briefing Design — Charts That Clarify Rather Than Overwhelm

## Day 5: Questioning and Challenge

- Structured Challenge Questions — Probing Plans Without Triggering Defence
- Red Team Reviews — Assigning Formal Opposition to Preferred Options
- Pre-Mortem Exercises — Imagining Failure to Reveal Hidden Risks
- Listening for Underlying Interests — Moving Past Stated Positions
- Reframing Techniques — Shifting Stalled Debates Onto Shared Ground

## Day 6: Working Through Disagreement

- Conflict Source Diagnosis — Separating Facts, Values and Interests
- Productive Dissent Norms — Making Candour Safe in Senior Forums
- Bridging Proposals — Combining Elements of Competing Options
- Escalation Path Design — Routing Unresolved Issues With Deadlines
- Repairing Relationships After Contest — Sustaining Trust Between Functions

## Day 7: Chairing and Facilitating Reviews

- Chair Role Discipline — Balancing Neutral Facilitation and Executive Judgement
- Airtime Management — Drawing Out Quiet Voices and Containing Dominant Ones
- Hybrid Meeting Techniques — Keeping Remote Participants in the Debate
- Parking and Time-Boxing — Protecting the Decision Agenda From Drift
- Reading Group Dynamics — Spotting False Consensus and Silent Resistance

## Day 8: Closing the Review With Decisions

- Consensus Testing — Checking Real Agreement Before Moving On
- Decision Rules — Choosing Between Consensus, Consent and Executive Call
- Decision Record Drafting — Capturing Owners, Conditions and Triggers
- Commitment Statements — Securing Visible Ownership From Each Function
- Dissent Logging — Recording Minority Views for Later Review

## Day 9: From Agreement to Follow-Up

- Action Cascade Planning — Translating Decisions Into Unit Priorities
- Outcome Messaging — Aligning What Each Function Hears and Acts On
- Follow-Up Review Design — Tracking Decisions Against Agreed Triggers
- Upward Briefing — Reporting Review Outcomes to Boards and Sponsors
- Learning Loops — Improving the Next Review From This One

## Day 10: Practising the Planning Review Dialogue Playbook

- Full Review Simulation — Applying Option Framing Under Live Challenge
- Disagreement Role Play — Applying Dissent Norms and Bridging Proposals
- Chairing Rotation — Applying Facilitation and Consensus Testing Skills
- Peer Feedback Panels — Refining Personal Review Habits
- Planning Review Dialogue Playbook — Completing Templates, Norms and Decision Records

## Applying Strategic Dialogue for Planning Reviews After the Course

- Redesign the agenda of the next quarterly planning review around three decision questions, each supported by a framed option set and a short pre-read.
- Introduce a decision record and dissent log at the close of that review, then hold a follow-up session against its review triggers within four weeks.

## Strategic Dialogue for Planning Reviews Questions FAQ

### What is strategic dialogue for planning reviews and why does it matter now?

It is the disciplined way leaders frame choices, challenge evidence and settle disagreement in planning reviews. It matters now because shorter strategy cycles and divided functions punish reviews that end without a clear, owned decision.

### Which roles gain most from strategic dialogue for planning reviews?

Directors and strategy leads gain most: strategy office heads, business unit directors, portfolio leads, finance and performance directors and chiefs of staff who prepare, chair or present at reviews where options are contested.

### How does strategic dialogue for planning reviews differ from a general negotiation or communication course?

It focuses on one setting, the internal planning review. Rather than bargaining with external parties or presenting skills alone, you practise shaping decision questions, framing options, handling dissent among colleagues and closing reviews with recorded commitments.

## What do you bring back from strategic dialogue for planning reviews?

You bring back a ready set of review templates: decision question formats, option tables, challenge question banks, dissent norms and a decision record, assembled into a playbook your leadership team can use at its next review.

## Strategic Dialogue for Planning Reviews: The Way Forward

The Planning Review Dialogue Playbook first informs how the next quarterly review is framed: which choices reach the agenda and how options are presented. Chairs, strategy office staff and presenting directors use it together. After its first use, the perspective worth revisiting is how disagreement was voiced and logged, since that shows whether candour in the room is rising or falling.