



EnergizeGrowth® Plan Review Process

Step #	Purpose	Actions	Comments
1	Distribute the plan	Provide copies of the plan several days in advance of the meeting. Select a peaceful offsite location for the review session.	Develop a formal method to invite participants to the review meeting. Thank them in advance for their commitment to helping you.
2	Present the plan	Rehearse how you will present the session beforehand. Can you present your plan in 15 minutes or less? Are you presenting the plan in 10 slides or less? If not, keep rehearsing.	During your presentation, ask the participants to refrain from interrupting or asking questions.
3	Clarifying Questions	During this phase, the purpose is to fill in the blanks for your review team. Remind them that this is NOT a time to challenge the integrity or accuracy of your plan. All clarification questions should be delivered in one sentence and as succinctly as possible.	Allow 10-15 minutes of clarifying questions. When you respond, be as brief as possible. If they ask you when the company was founded, for example, do not answer by explaining what it was like getting your first client, the size of the office space, or the color of your logo!

4	<p>Challenge Questions</p>	<p>Assign the following roles before proceeding with this stage:</p> <p><i>Devil's Advocate:</i> a person who looks for everything that could go wrong with your growth plan</p> <p><i>Competitor:</i> this person pretends they surreptitiously found a copy of your plan and they are ready to share why their solution is better.</p> <p><i>Finance Expert:</i> be ready to answer their questions about capacity, ROI, initial costs, and feasibility.</p> <p><i>Client:</i> how will this plan help or hurt their condition? Does it introduce too much change and disruption to the status quo? Do you offer a clean transition plan to help them take advantage of the new products and services you are considering in your growth plan?</p>	<p>Take notes during this phase. When each person asks you a challenging question, take notes. Do not respond or defend your position. Avoid showing approval or disapproval of their positions.</p> <p>A good challenge question would sound like this:</p> <p><i>“This has never been done before. What makes you think it’s possible now?”</i> (a classic DA question)</p> <p><i>“Our services are consistently ranked higher in dependability than yours. What makes you think this growth plan will improve your reputation?”</i> (a classic competitor question)</p>
5	<p>Identify Biggest Gaps</p>	<ol style="list-style-type: none"> 1. Give everyone a 10 minute break. 2. Write down the biggest gaps you see from the challenge and clarification phases. 3. Prioritize them as best as you can. 4. Then ask the group to return to the meeting. 	<p>If you have trouble seeing the biggest gaps, ask the group for help when they return.</p>

6	Roundtable recommendations	Present the 3-4 biggest gaps in your plan, and your strategies for overcoming them.	This should take no longer than 5 minutes.
7	Closing remarks	This is the final opportunity for your supporters and advocates in the room to offer recommendations, resources, and reality checks.	<p>Thank them profusely for their candor and support.</p> <p>Schedule the next plan review.</p> <p>Establish a process for reporting your progress. Show them you are willing to be held accountable.</p>