ACTION PLANNING WORKSHOP

Align the Organization. Clarify Ownership. Focus on What Matters.

How much time does your organization spend reacting instead of executing intentionally? How confident are you that the right roles own the right work and that those activities truly matter?

The Action Planning Workshop (APW) helps organizations step back, see themselves clearly and make informed decisions about where to focus next. Using the Pragmatic Framework™, teams align on responsibility ownership, assess effectiveness, identify meaningful gaps and create a focused plan for action.

Rather than prescribing solutions, the APW creates shared understanding and commitment—so teams leave aligned, confident and ready to move forward.

WORKSHOP EXPECTATIONS

The value of the Action Planning Workshop comes from shared understanding and honest alignment.

Participants are expected to:
- Engage actively in discussions, scoring, and decision-making exercises
- Anchor conversations in current reality, not ideal state
- Contribute constructively, even when perspectives differ
- Remain present for the full session to maintain continuity of decisions

These expectations help ensure the workshop moves teams to closer alignment, meaningful outputs and focused, actionable next steps.

TOTAL HOURS
7.5

GUIDED FRAMING AND
CONTEXT-SETTING:
20%

HANDS-ON WORKING
EXERCISES:
40%

DISCUSSION AND
ALIGNMENT:
40%

DELIVERY FORMAT:
PRIVATE SESSION
(VIRTUAL OR IN-PERSON)

PREREQUISITE:
PRAGMATIC'S
FOUNDATIONS COURSE

WORKSHOP OBJECTIVES

MAIN OBJECTIVE: Align organizations and teams by clarifying ownership, assessing current capabilities, identifying performance gaps and establishing a focused action plan. Participants will:

Clarify Ownership
- Establish clear accountability for each Pragmatic Framework activity based on current reality and future needs
- Reduce role confusion by focusing on responsibility rather than titles

Assess Effectiveness and Importance
- Evaluate how well the organization performs key activities today
- Determine which activities are most critical over the next 12–24 months

Identify Priority Gaps
- Surface meaningful gaps between importance and current performance
- Align on the few gaps that matter most right now

Establish Focused Next Steps
- Translate insight into a 30-60-90-day plan
- Assign ownership and define indicators of progress

COURSE ARTIFACTS

During the workshop, teams work in a shared Action Planning Worksheet that captures decisions and alignment in real time. By the end of the session, each organization leaves with:

- A documented view of current and future ownership across the Pragmatic Framework
- A scored heat map highlighting priority gaps
- A short list of focus activities for the next planning horizon
- A 30-60-90-day action plan with owners and success indicators

These artifacts are designed to support continued alignment and follow-through after the workshop.

WORKSHOP MODULES

Framework Overview
- Align on the Pragmatic Framework™ as a shared language for product and go-to-market work, establishing common context for the session

Ownership Alignment
- Identify who currently owns each activity and who should own it going forward, focusing on accountability and sustainability rather than idealized structures

Importance and Assessment Scoring
- Score each activity to determine its relative importance over the next 12–24 months and assess current execution and capability

Gap Identification and Prioritization
- Review the resulting heat map to identify meaningful gaps, discuss trade-offs and align on the most impactful focus areas

Action Planning
- Create a clear, actionable plan that defines why each priority gap matters, what must change, who is accountable and how progress will be measured

PARTICIPATION REQUIREMENTS

The Action Planning Workshop is a highly interactive, working session. To ensure participants can fully engage, the following participation requirements apply. Participants should be prepared to:

- Work on a laptop or desktop computer throughout the workshop (The Action Planning Worksheet is completed digitally in real time.)
- Collaborate in shared documents during scoring, prioritization and action planning exercises.

For virtual format, participants should:
- Have reliable internet access
- Join from a distraction-free environment
- Have video enabled, whenever possible

For in-person format, participants should:
- Bring a laptop and power cord
- Be prepared to work collaboratively at their tables