

CASCADING GOALS WORKSHEET

		DEPARTMENTS				
CORPORATE GOALS						
	1.					
	2.					
	3.					
	4.					
	5.					
	6.					
	7.					
	8.					

COMPETITIVE ADVANTAGE EVALUATION

Use this worksheet to quickly evaluate whether your advantage withstands the test of time. The more responses to the right-hand side of the form, the better. It's okay if you don't pass each one. Think about how you can add to your competitive advantage to make it even more sustainable.

ANSWER THE FOLLOWING QUESTIONS

Will your customers see a consistent, superior difference between your product/service and those of your competitors?

No difference **Huge difference**

How difficult will it be for competitors to imitate your advantages?

Not difficult **Very difficult**

Can your company constantly improve?

Little improvement **Extensive improvement**

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COMPETITOR GRID

After you collect data on your competition, follow these steps to develop your Competitor Grid:

- 1. Select the product or service or customer segment to focus on.**
If your competitors are the same across product or service lines or customer segments, skip this step.
- 2. Narrow down your playing field if at all possible.**
Look closely at your top three competitors or groups of competitors. Add your organization to the list.
- 3. Determine what your competitors' key strengths and weaknesses are.**
The factors can be customer service, pricing, quality, operations, resources, personnel, and so on. Develop a good understanding of likely changes your competitors may make in the near future. Use the information collected during your intelligence gathering.
- 4. Summarize what each competitor's key point of differentiation is.**
Answer the question, "What is XYZ competitor great at?"
- 5. Critically review your Competitor Grid to summarize themes to add to your opportunities and threats.**
Add your thoughts to your list of opportunities and threats. Use this information to develop strategies, strategic objectives and goals.

COMPETITOR	STRENGTH	WEAKNESS	DIFFERENTIATION
Themes:			
	(Summarize threats)	(Summarize opportunities)	

CUSTOMER BUSINESS PURPOSE QUESTIONNAIRE

WHAT IS THE PURPOSE OF OUR BUSINESS?

1. If you were to describe our company in one sentence or one word, what would it be or how would you describe us?

2. What are we doing that you like? How do we help meet your needs?

3. What are we doing that you don't like? Or in what areas could we improve?

4. Is there anything that we are not currently providing that you need?

5. When your friends are looking for a product(s) that we sell, do you refer our company? Why or why not?

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CUSTOMER VALUE CALCULATOR

Find out for yourself just how much money each of your customers is worth to you. Use this worksheet to calculate your customers' merit.

CALCULATING THE LIFETIME VALUE OF A CUSTOMER TO YOUR BUSINESS.	
	Your Estimate
1. Average sale per customer per month	
2. Number of sales per year per customer	
3. Number of years customer buys from you	
4. Number of referrals from customer	
5. % of referrals that become customers	
6. Lifetime Value before referrals = Calculation: Gross Sales per year per customer (1x2) X Number of years customers buy from you (3) =	
7. Lifetime Value of Referrals = Calculation: Referrals who become customers (4x5) X Lifetime Value before Referrals (6) =	
Total Lifetime Value of a Customer (6+7)	

EMPLOYEE BUSINESS PURPOSE QUESTIONNAIRE

WHAT IS THE PURPOSE OF OUR BUSINESS?

1. What is the mission or purpose of our company?

2. What do you think our company does best?

3. What doesn't our company do well?

4. What does our company do differently than our competitors?

5. Why are our customers our customers?

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INDUSTRY ENVIRONMENT QUESTIONNAIRE

Use this questionnaire to start your list of opportunities and threats in your industry environment.

WHEN WILL THIS FORCE IMPACT OUR COMPANY?	NOW	1-3 YEAR	5-10 YEAR	NEVER	IS THIS AN... OPPORTUNITY THREAT	
Increase in the number of competitors						
Potential for substitute products						
Increase in the power of our suppliers or vendors						
Increase in the power of our buyers or customers						
Greater intensity of rivalry between us and our competitors						

MISSION STATEMENT WORKSHEET

RESPOND TO THE FOLLOWING STATEMENTS	YES	NO
The mission statement is a statement of our company's purpose.		
The mission statement fits the current market environment.		
The mission statement is based on our core competencies. <i>(A core competency is a unique strength.)</i>		
The mission statement is motivating and inspires employee commitment.		
The mission statement is realistic.		
The mission statement is specific, short, sharply focused and memorable.		
The mission statement is clear and easily understood.		
The mission statement says what the company wants to be remembered for.		

If you answered "no" 4 or more times, consider reworking your mission statement.

OPERATIONAL PROCESSES QUESTIONNAIRE

Answer the questions here to get a better understanding of your operational, customer, relationship, and innovation processes.

HOW GOOD IS YOUR COMPANY AT...?						
	STRENGTHS		WEAKNESSES		CRITICAL TO YOUR GROWTH THIS YEAR	
	High	Low	High	Low	Yes	No
Developing and sustaining supplier or vendor relationships						
Efficiently producing products and services						
Effectively delivering your product or service to your customer						
Effectively managing operating risk						
Effectively selecting, acquiring and retaining your customers						
Growing relationships with your customers						
Effectively managing your environmental and community involvement						
Effectively managing your alliance relationships						
Managing and completing the key projects deemed critical						
Efficiently innovating and bring new products and service to market						
Leveraging technology to improve operational efficiency						
Consistently and continually communicating the company's key initiative to everyone on staff						
Enhancing employee productivity						

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Enhancing employee productivity						

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HOW GOOD IS YOUR COMPANY AT...?						
	STRENGTHS		WEAKNESSES		CRITICAL TO YOUR GROWTH THIS YEAR	
	Excellent	Poor	Fair	Poor	Yes	No
Developing and sustaining supplier or vendor relationships						
Efficiently producing products and services						
Effectively delivering your product or service to your customer						
Effectively managing operating risk						
Effectively selecting, acquiring and retaining your customers						
Growing relationships with your customers						
Effectively managing your environmental and community involvement						
Effectively managing your alliance relationships						
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READINESS ASSESSMENT

This instrument will help you examine the strength of support in your organization for effective strategic planning. Fifteen conditions which foster effective strategic planning are listed below. Consider to what extent each condition is present in your organization and state your feelings by entering an “X” in the appropriate column.

	Not very present	Somewhat present	Mostly present	Almost completely present
There is a burning platform driving change				
Senior team mostly has prior skills and competencies in planning				
Decisions are made mostly on facts, not feelings				
Visible commitment of senior leader to champion the process				
Senior team communicates effectively				
Senior team has a standard meeting structure				
Sufficient information is available on the organization’s business activities (Ex. Performance Management Dashboard)				
Sufficient information is available on the organization’s business environment (Ex. Competitive Analysis)				
Senior team largely sees a need for a formal planning process – desire to do planning and implementation				
There are good communications between segments of the organization				
Financial, organizational and political stability exists – no major changes are in process				
Overall, there is a willingness to take calculated risks				
Generally, sufficient time and attention are given to planning tasks				
Leadership demonstrates creativity, flexibility and adaptiveness to change				
Leadership is committed to check in on plan performance monthly or quarterly				

STRATEGIC PLANNING PROCESS CHECKLIST

- 1 Get Ready & Organized:** Identify specific issues and choices the process should address.
 - Determine organizational readiness
 - Create the planning committee
 - Identify the information which must be collected to help make sound decisions.
- 2 Articulate the Mission and Vision:** Owners/manage clarify why the organization exists and what the end game is.
 - Determine its primary business and organizational purpose
 - Identify the corporate values
 - Create an image of what success would look like
- 3 Review Strategic Position:** Gather up to date information to develop an understanding of the critical issues.
 - Information should include:
 - Internal strengths and weaknesses
 - External opportunities and threats through a competitive analysis
 - Market opportunities through customer surveys
 - Synthesize into a SWOT (situational analysis)
- 4 Agree on Priorities:** Identify the broad approaches for addressing critical issues
 - Solidify the organization's competitive advantage
 - Determine long-term goals/objectives
 - Select strategies for customer segments
 - Establish SMART short-term goals/objectives and the results to achieved
 - Draft this year's action items
- 5 Organize the Plan:** Put the pieces together into one coherent document with the following reports:
 - Complete Strategic Plan – for reference
 - One-Page Strategic Plan – for communicating
- 6 Roll-Out the Plan:** Communicate the plan across the organization:
 - Everyone in the organization has received a copy of the plan in some form (printed, emailed, posted on a wall in the break room)
 - Identify the strategic plan leader
 - Provide budgetary and resource support
- 7 Identify Next Actions:** Make the plan tangible to each member of the team by clearly identifying what he/she is responsible for:
 - Scorecard – for measuring
 - Action Sheets – for executing
- 8 Hold Everyone Accountable:** Monitor your plan by reporting performance metrics on a monthly or quarterly basis.
 - Identify the source of each metric associated with measurable goals
 - Set up systematic process for monthly or quarterly reporting
 - Communicate to each responsible person when and how to report on their goals
 - Hold monthly or quarterly strategy meetings
 - Regularly monitor, evaluate, and adapt

STRATEGY REVIEW DRAFT AGENDA

MANAGEMENT LEAD KICKOFF AND ANNOUNCEMENTS

CEO ORGANIZATIONAL PERFORMANCE REVIEW BY GOAL

- Overall Organization Performance: KPI Movers – what positive progress have we made since last month? Why? KPI Anchors – where have we lost ground? Why?
 - Review of Department Goals & Progress: Selected by CEO, deep dive into department goals that align with the selected organization goals to discuss issues / concerns / modifications.
Report: Dash, Executive Summary with Progress
-

STRATEGIC TOPIC LEADER STRATEGIC ISSUE (A TOPIC THAT HAS EMERGED THAT NEEDS DIALOGUE AND THEN A DISCUSSION BY THE GROUP)

- Use discussion model if necessary
 - Brief the strategic issue (qualifications: across Teams, long-term, potential to have significant impact on overall performance, something this group can solve)
 - Clarifying questions based on briefing
 - Determine recommendations or solutions and next steps
-

CEO WRAP UP

- Summarize decisions and actions
- Clarify potential strategic topics for the next meeting

SWOT ANALYSIS TEMPLATE

Begin assessing your company's external situation by taking a quick pulse of your opportunities and threats. To do so, investigate the various areas listed here to get more specific about what's happening in your operating environment. This format ensures that you're looking at your strengths and weaknesses holistically. As you work through the worksheet, be sure to capture all your thoughts by writing them down.

INTERNAL		EXTERNAL	
Strengths	Capabilities: Human Capital Organizational Capital Knowledge Capital Resources: Financial Resources Physical Resources Intangible Resources Processes: Operational Processes Customer management Processes Relationship management Processes Innovation Processes Other: Technology management Communication Productivity	Opportunities	Operating Environment: Political/legal Environment Social Technological Industry: New competitors Substitute products Power of suppliers Power of buyers Competitive rivalry Market: Growing, shrinking Size of markets New markets
	Current Customers: Customer mix Satisfaction Loyalty Strength of your value chain Strength of your value prop		Competitors: Who they are Strengths, weaknesses Strategies Objectives
Weaknesses		Threats	

SWOT ANALYSIS TEMPLATE

	OPPORTUNITIES	THREATS
STRENGTHS		
WEAKNESSES		

SWOT ANALYSIS TEMPLATE

	OPPORTUNITIES	THREATS
STRENGTHS		
WEAKNESSES		

VALUES EVALUATION WORKSHEET

ANSWER THE FOLLOWING QUESTIONS	YES	NO
If you were to start a new company, would this core value be part of its foundation?		
Will you continue to stand by and hold this value no matter what happens in the competitive environment?		
Are you willing to stand by this value no matter what the cost – for example lost clients or lost revenue?		
Do you believe that employees who do not share this value should continue to be part of your company?		
Do you demonstrate this core value in your leadership?		
Would you sell your company before giving up this core value?		
Do you apply this core value in your personal activities?		
If you could do anything in the world, would you continue to apply this core value to your productive activities?		

If you answered “no” 4 or more times, consider reworking your values.

VISION EVALUATION WORKSHEET

ANSWER THE FOLLOWING QUESTIONS	YES	NO
Does it represent the mountain top your company is striving to reach?		
Is it motivating, clarifying the direction in which your organization needs to move to?		
Is your vision statement short?		
Does it include verb-phrases that are forward-looking?		
Are you using future tense?		
Does the vision statement inspire, creating a vivid image in the reader's head?		
Does it give your employees a larger sense of purpose?		

If you answered "no" 3 or more times, consider reworking your vision.