

Being strategic is the end,
planning is merely the means.



MYSTRATEGICPLAN TRAINING

STRATEGIC PLANNING 101

M3 BY THE NUMBERS

In the past three years we have...

- Managed 100+ strategic planning processes
- Deployed 800+ strategic management systems
- Built consensus and commitment with 3,000+ executives, managers, boards
- Empowered 1 million+ strategists & soon-to-be strategists

We love what we do!



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MYSTRATEGICPLAN OVERVIEW



Create Strategy Faster(er)



Empower the Team



Manage Execution



AGENDA

1. How and why having a strategic plan is critical to your organization's sustainability
2. The key elements of a strategic plan
3. A schedule and process to develop your plan
4. Your Success Checklist for using MyStrategicPlan



MSP STRATEGIC PLANNING PROCESS

Our Strategic Management Process

Getting started: ✓ Planning team ✓ Create schedule ✓ Gather documents

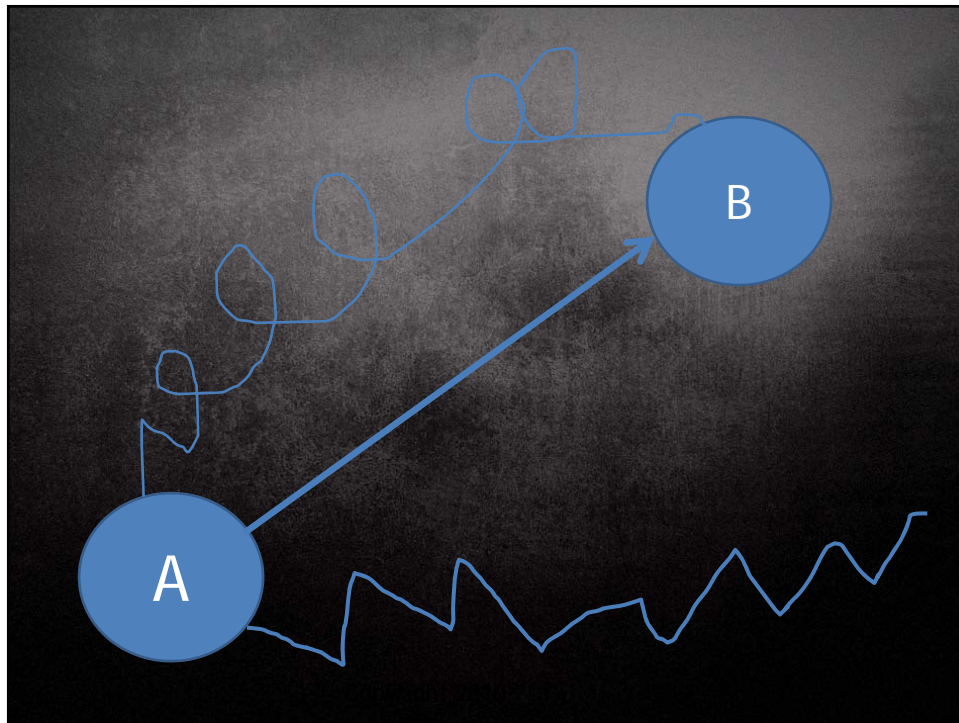


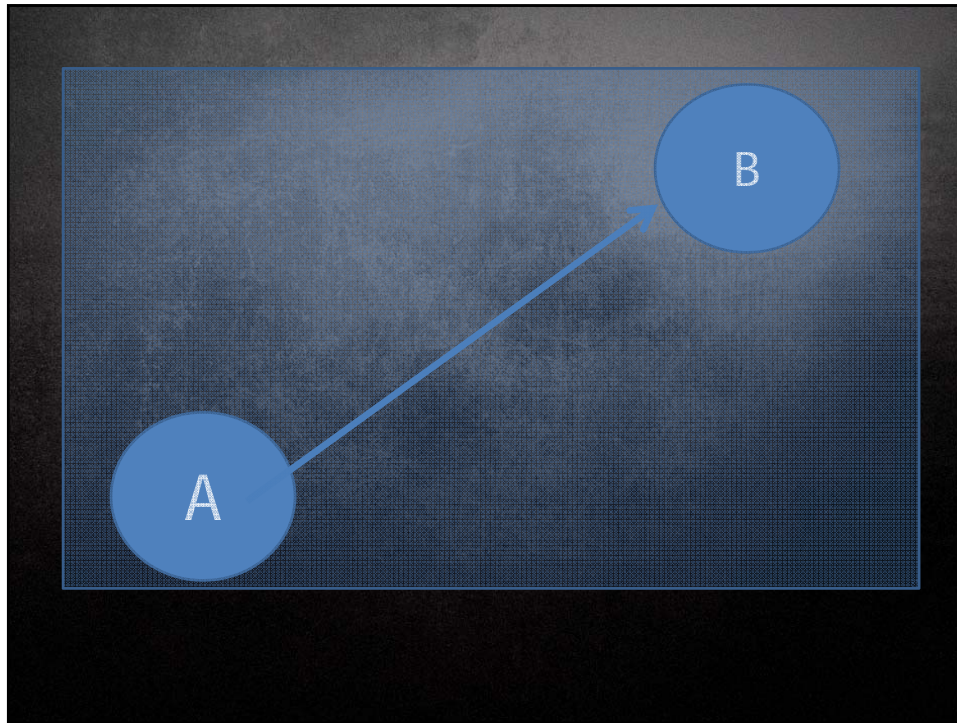


Why plan? What does it do for your organization?

**WHY HAVING A STRATEGIC PLAN IS
CRITICAL TO YOUR SUSTAINABILITY**

The image features a stylized illustration of a human eye. Inside the eye, a small figure of a person is holding a red telescope, looking towards the right. The eye is set against a solid blue background. Below the illustration, there is a dark blue horizontal band containing white text. The text asks 'Why plan? What does it do for your organization?' and then states 'WHY HAVING A STRATEGIC PLAN IS CRITICAL TO YOUR SUSTAINABILITY' in bold, light blue capital letters.





STRATEGIC PLANNING MEANS DIFFERENT THINGS TO DIFFERENT PEOPLE.

Articulated Plan = Having a Plan

- Mission, Vision, Goals, Actions, and KPIs for the next 24-36 months

Strategic Differentiation = Having a Strategy

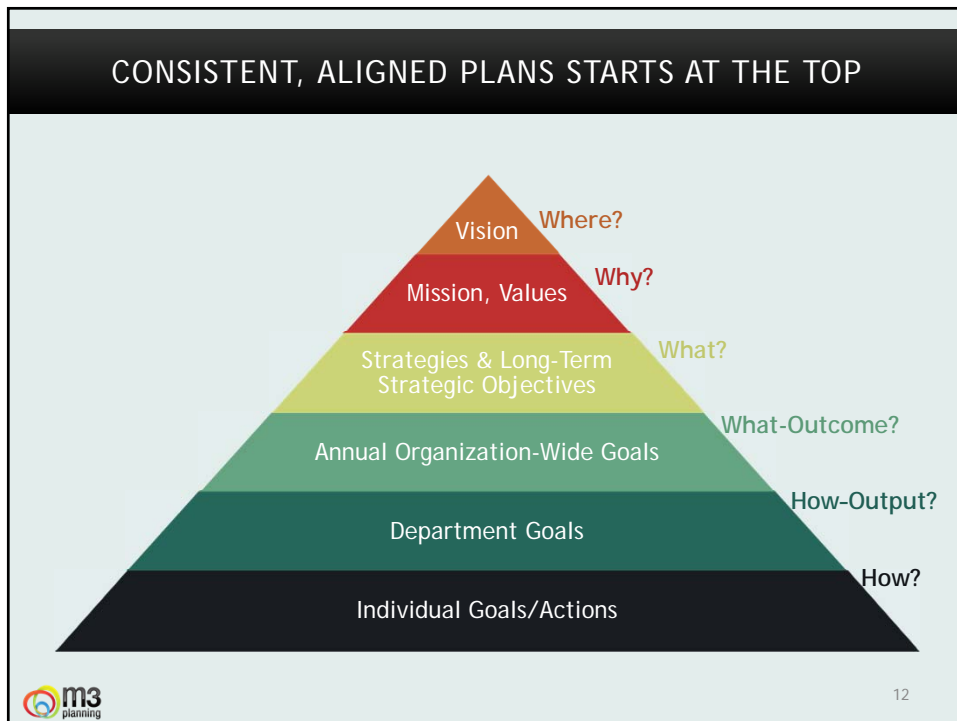
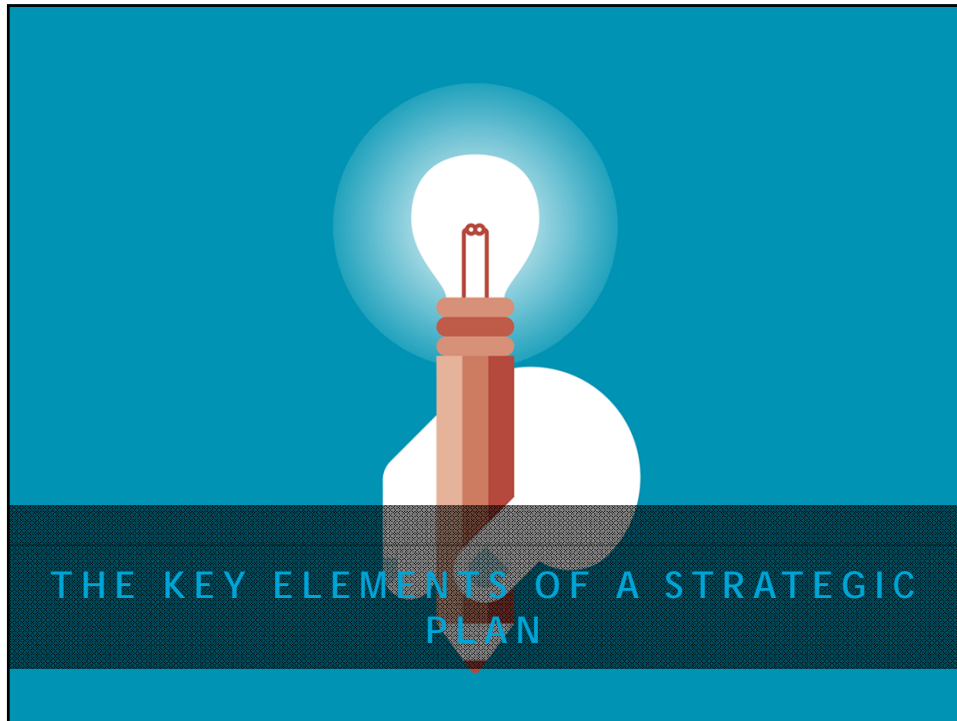
- A unique value proposition developed from a clear understanding of market position and customer needs.

Organizational Engagement = Managing Strategically

- Everyone knows the strategic direction, understands their role and commits to accountability with an execution/governance process in place.

Organizational Transformation = Leading Strategically

- Team that is driven by shared values, consistently driving decision making based on the agreed upon strategy with data, structure and systems to support the activity.



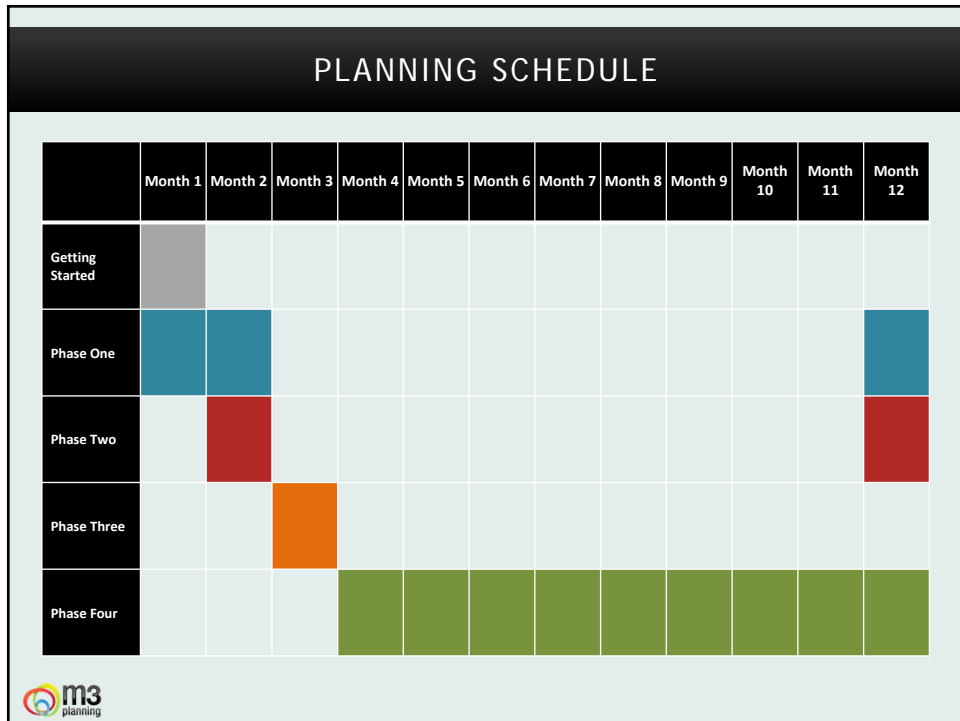
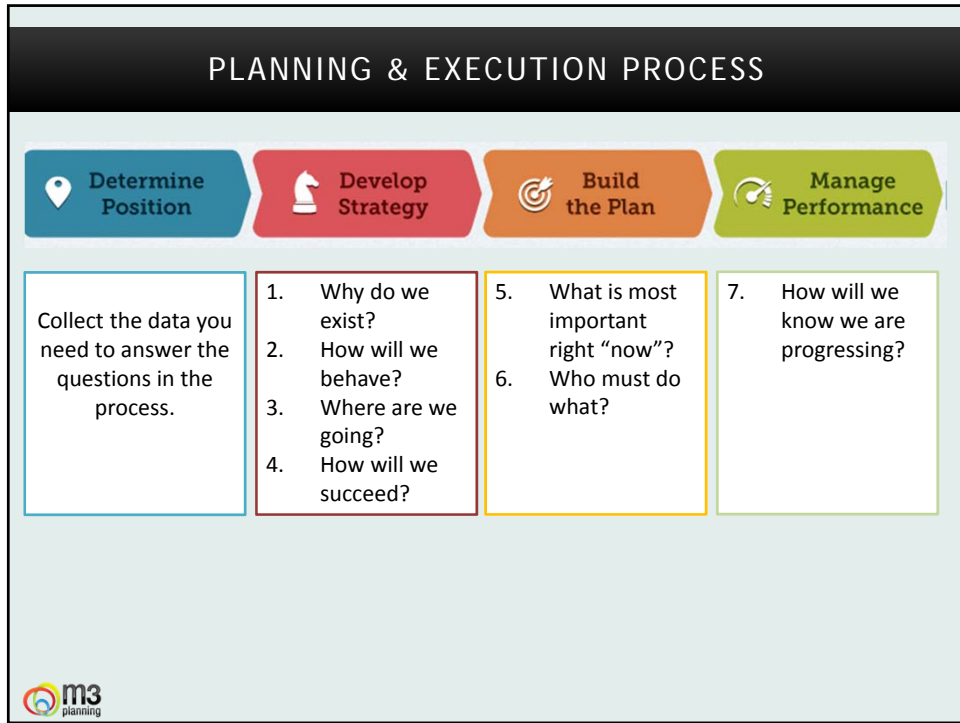
Establish your processes, schedule and accountabilities

SCHEDULE & PROCESS TO DEVELOP YOUR PLAN

PLANNING TEAM

| Determine Position | Develop Strategy | Build the Plan | Manage Performance |
|--|---|---|--|
| <ul style="list-style-type: none"> • Strategy Leader • CEO • Planning Team* • Staff via survey • Exec Team via survey | <ul style="list-style-type: none"> • Strategy Leader • CEO • Planning Team* • Executive Team • Board | <ul style="list-style-type: none"> • Strategy Leader • CEO • Planning Team* • Executive Team • Managers • Individual Contr. | <ul style="list-style-type: none"> • Strategy Leader • CEO • Executive Team • Managers • Individual Contr. • Board |

* **Ideal Planning Team:** Strategy Leader, CEO, CFO, VP of HR, Board Pres.



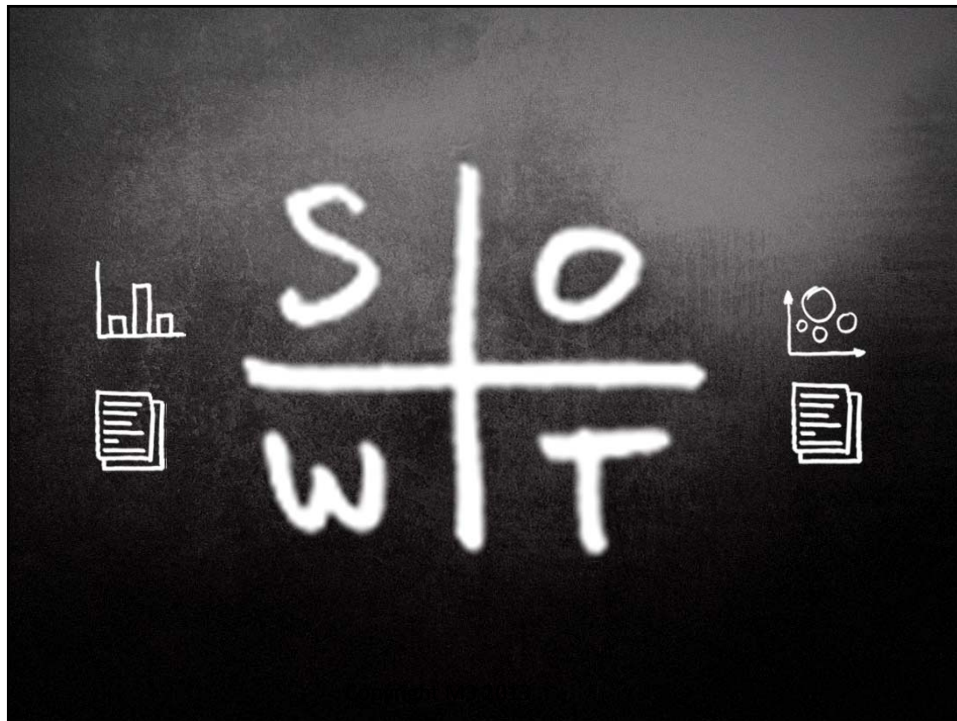


INTERNAL - STRENGTHS/WEAKNESSES

| Capabilities: | Resources: | Processes: | Current Customer: | Other: |
|----------------|------------|-------------------------|------------------------------|-----------------------|
| Human | Financial | Operational | Customer mix | Technology management |
| Organizational | Physical | Customer management | Satisfaction | Communication |
| Knowledge | Intangible | Relationship management | Loyalty | Productivity |
| | | Innovation | Strength of your value chain | Profit margins |
| | | | Strength of your value prop | |

| EXTERNAL - OPPORTUNITIES/THREATS | | | |
|--|--|--|--|
| 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 | Competitors: Who they are Strengths, weaknesses Strategies |








MISSION STATEMENT OVERVIEW

What is our purpose?

Why do we exist? What do we do?

Definition:
The mission statement describes an organization's purpose or reason for existing.

Outcome:
A short, concise, concrete statement that clearly defines the scope of the organization.



VALUES STATEMENT OVERVIEW

How will we behave?

Definition:

Your **values** statement clarifies what your organization stands for, believes in and the behaviors you expect to see as a result.

Outcome:

Short list of 5-7 core values.



VISION STATEMENT OVERVIEW

Where are we going?

Definition:

A Vision Statement defines your desired future state and provides direction for where we are going as an organization.

Outcome:

A picture of the future



COMPETITIVE ADVANTAGE OVERVIEW

What are we best at?

Definition:

A characteristic(s) of an organization that allows it to meet their customer's need(s) better than their competition can.

Outcome:

A list of 2 or 3 items that honestly express the organization's foundation for winning.



Competitive Advantage – Building

Unique Strengths

What you do well

Core Competencies

What you do better than your competitors

Competitive Advantage

How you provide value



LONG-TERM STRATEGIC OBJECTIVES OVERVIEW

What must we focus on to achieve our vision?

What are the "big rocks"?

Definition:

Long-term, broad, continuous statements that holistically address all areas of your organization.

Outcome:

Framework for your plan - no more than 6



BALANCING YOUR STRATEGIC OBJECTIVES



PHASE 3: BUILD THE PLAN



ORGANIZATION-WIDE GOALS OVERVIEW

What is most important right now to reach our long-term objectives?

Definition:

Annual statements that are specific, measurable, attainable, responsible and time bound. These are outcome statements expressing a result expected in the organization.

Outcome:

Clear outcomes for the current year.

SHORT-TERM GOALS & ACTION ITEMS OVERVIEW

Who must do what by when?

Definition:

Functional goals/action items support the accomplishment of the annual objectives and align with individual performance plans.

Outcome:

Goals at the manager and individual level that clearly explain who is doing what by when with a clear deliverable.



GOAL CASCADING

| Number | Level | Who is responsible | Time Frame |
|-----------|-------------------------------|---|-----------------|
| 1 | Long-Term Strategic Objective | Not assigned - far reaching and very broad | 3-5 years |
| 1.1 | Corporate Goal | Corporate-wide - not assigned Must have Target and Measure (KPI) | 18-24 months |
| 1.1.1 | Department Goal | Assigned to Department responsible for seeing this goal completed. Must have Target & Measure | 12-18 months |
| 1.1.1.1 | Team Member Goal | Assigned to Team Member responsible for seeing this goal completed. Must have Target & Measure | 6-12 months |
| 1.1.1.1.1 | Team Member Action | Assigned to Team Member responsible for seeing this action completed. Short term items only. Must have Target & Measure | 30, 60, 90 days |




KEY PERFORMANCE INDICATORS OVERVIEW

How will we measure our success?

Definition:
 Key Performance Indicators (KPI) are the key measures that will have the most impact in moving your organization forward. We recommend you guide your organization with measures that matter.

Outcome:
 5-7 measures that help you keep the pulse on your performance



PHASE 4: MANAGE PERFORMANCE

Our Strategic Management Process

Getting started: ✓ Planning team ✓ Create schedule ✓ Gather documents

Develop Strategy

- Mission:** Determine your organization's core purpose.
- Values:** Identify your core beliefs.
- Vision:** Create an image of what success looks like in 5 years.
- Competitive Advantages:** Solidify your unique position.
- Org. Wide Strategies:** Establish the approach for how you will succeed.
- Long-Term Objectives:** Develop a 3 year, balanced framework of 6 or less objectives.
- Forecast:** Develop a 3-year financial projection.

Manage Performance

- Rollout:** Communicate strategy to whole organization.
- Set Calendar:** Establish schedule for progress reviews.
- Leverage Tools:** Train team to use MyStrategicPlan.
- Adapt Quarterly:** Hold progress reviews and modify.
- Update Annually:** Review end of year, plan next year.



SETTING UP FOR EFFECTIVE EXECUTION

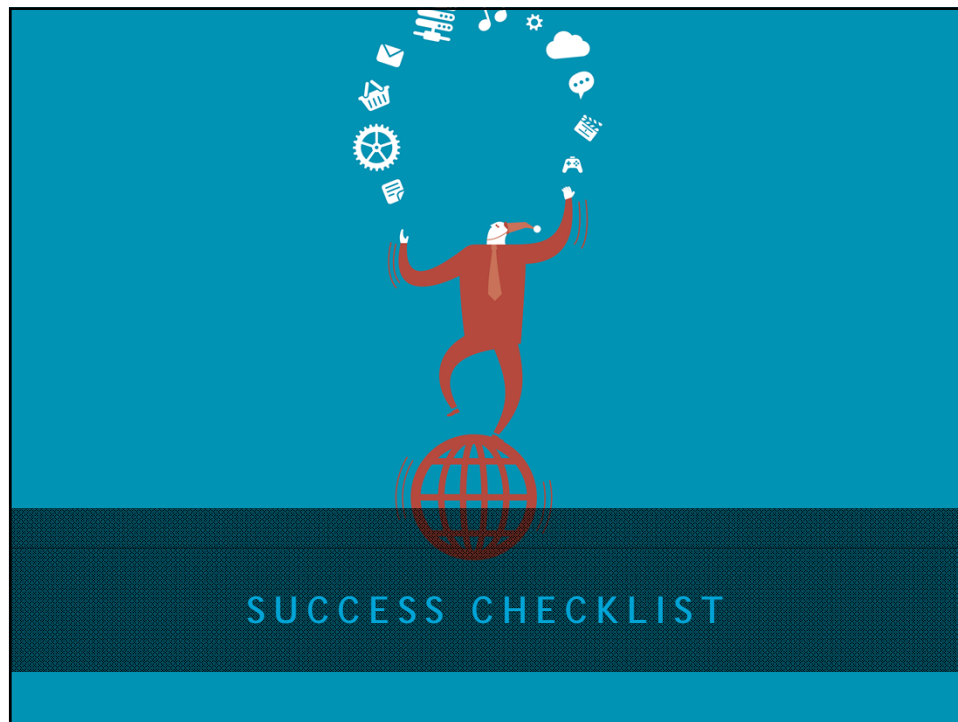
1. Narrow the focus - select high priority goals.
2. Empower the team to act on lead measures.
3. Make progress visible - weekly.
4. Create a cadence of accountability.



MAKE SURE THAT ALL STAKEHOLDERS GET THE RIGHT INFORMATION NEEDED TO EXECUTE.

| | Strategy | Execution |
|-----------------------------|--------------------------|-----------------------------|
| Public, citizens, customers | Websites, summary Sheets | Newsletters, Press Releases |
| Board | Executive Summary | KPI Dashboard |
| Senior Staff | Full Strategic Plan | KPI Dashboard |
| Managers | Department Plan | Dept. Dashboard |
| Staff | Individual Plan | Action Plan |





YOUR SUCCESS CHECKLIST:

- Ensure you have the right plan structure.
- Customize your plan to your organization.
- Take the BusinessReportCard and identify other assessment tools to help jump start your process.
- Identify and commit to your ideal schedule/timeline.
- Take advantage of all of our resources and trainings.

GET EXPERTISE WHEN YOU NEED IT
ONE-ON-ONE GUIDANCE FOR THOSE TROUBLE SPOTS IN YOUR PLANNING

mystrategicplan.com/strategic-planning-consulting

| | | | |
|---|-----------------------|---|-----------------------------|
|  | Quick Start Coach |  | Strategy Support |
|  | Strategic Plan Review |  | Customer / Employee Surveys |
|  | Plan Set-Up |  | Execution Workshop |



UPCOMING TRAININGS

- **Setting Strategic Objectives and Cascading Goals**
December 11 | 12 p.m. PT
- **Execution, Execution, Execution**
December 18 | 9 a.m. PT
- **Strategic Planning 101**
January 8 | 9 a.m. PT



To view one of our latest white papers titled,
“Guide to the Balanced Scorecard”

Go to:

<http://mystrategicplan.com/create-a-holistic-strategy/>



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