



JUMP-START YOUR PLAN
USING MYSTRATEGICPLAN

SIMPLE, PRACTICAL, FAST
GETTING YOUR 2014 PLAN DONE

PRESENTED BY NANCY OLSEN

WHAT IS STRATEGY?

Strategy means leading your resources...
...organizing & prioritizing the short-term
focus to reach the long-term.



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.



GOOD STRATEGY IS CHARACTERIZED BY...

- A clear direction and reason for existing - different than others
- Differentiated future - what competitors won't copy
- An overall guiding approach that directs and constrains action without fully defining its containment like guardrails.
- Design of coherent, coordinated actions to address the future - focus on leverage points



SEVEN QUESTIONS TO ANSWER

1. Why do we exist?
2. How will we behave?
3. Where are we going?
4. How will we succeed?
5. What is most important right "now"?
6. Who must do what?
7. How will we know we are progressing?



PLANNING & EXECUTION PROCESS



Collect the data you need to answer the questions in the process.

1. Why do we exist?
2. How will we behave?
3. Where are we going?
4. How will we succeed?

5. What is most important right "now"?
6. Who must do what?

7. How will we know we are progressing?



TOP PITFALLS TO AVOID

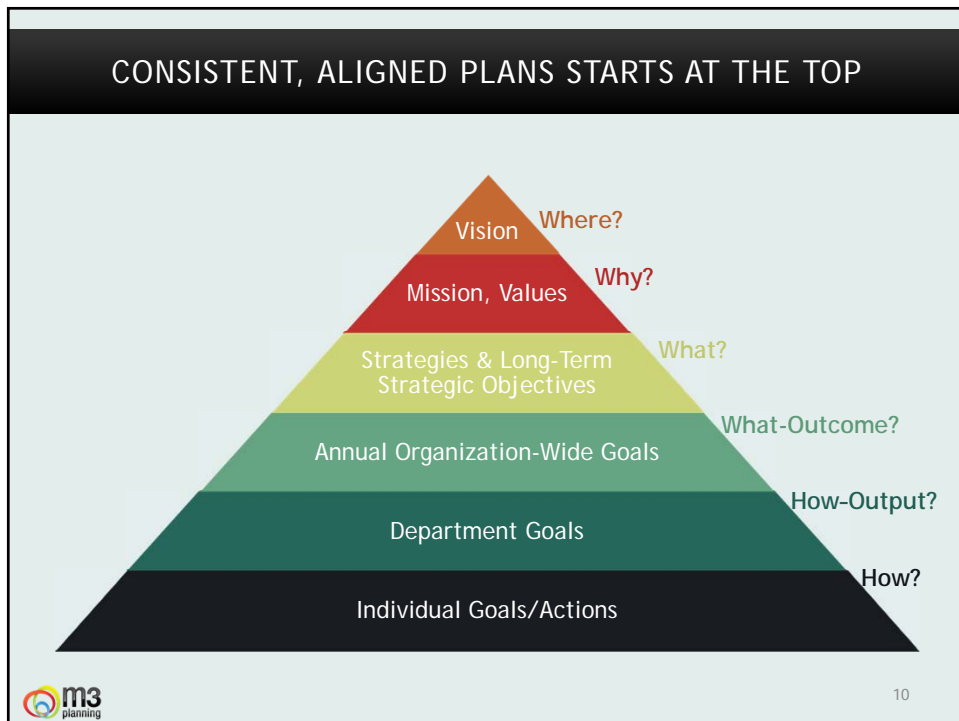
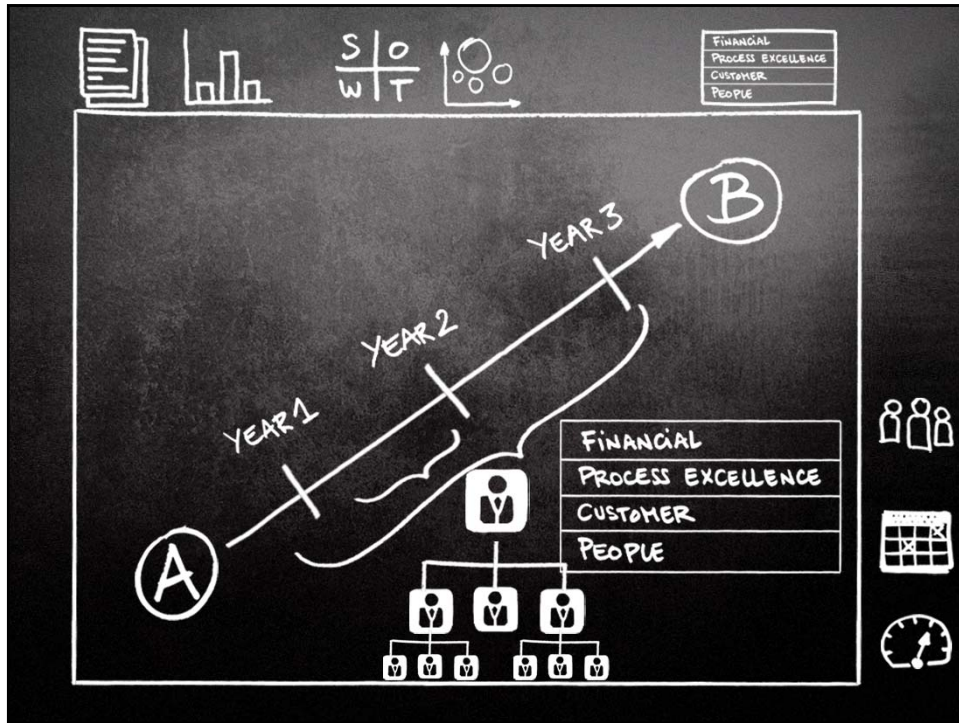
- Lack of engagement
- Not ready
- No resource connection
- A meaningless plan
- No accountability
- Lack of perspectives
- List of "to dos"
- No "Shift"
- Think SMART
- An overwhelming plan

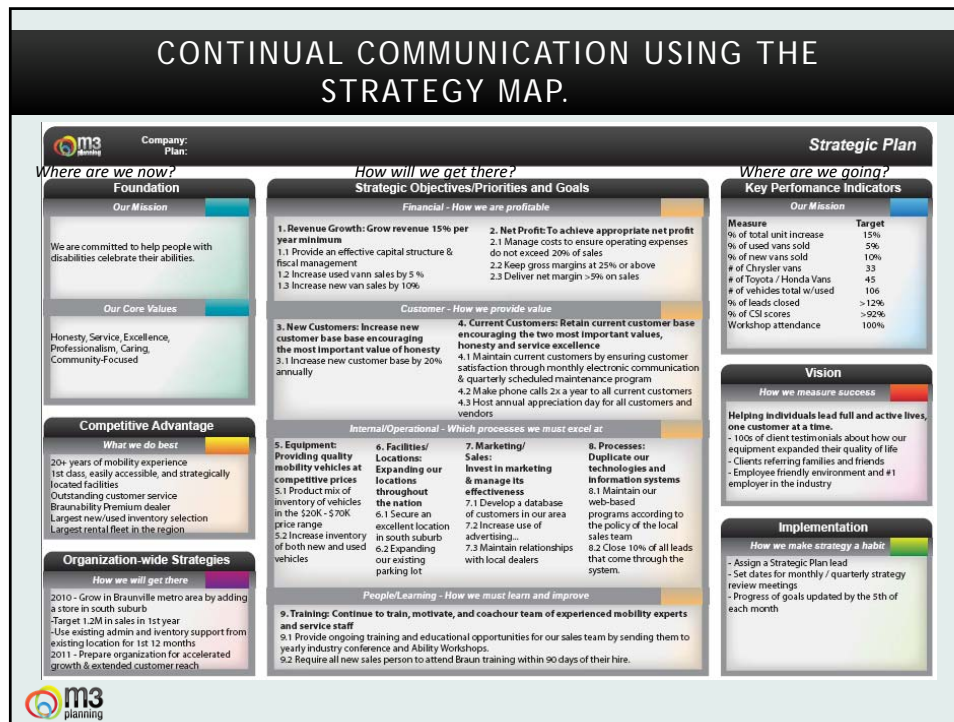


GETTING STARTED = COMMIT TO A SYSTEM

- Determine how wide and how deep.
- Establish the planning team.
- Set the schedule.
- Gather data. Create a SWOT.
- Hold an offsite. Make decisions. Create the plan.
- Communicate the plan.
- Execute the plan.
- Schedule and hold first monthly progress review.



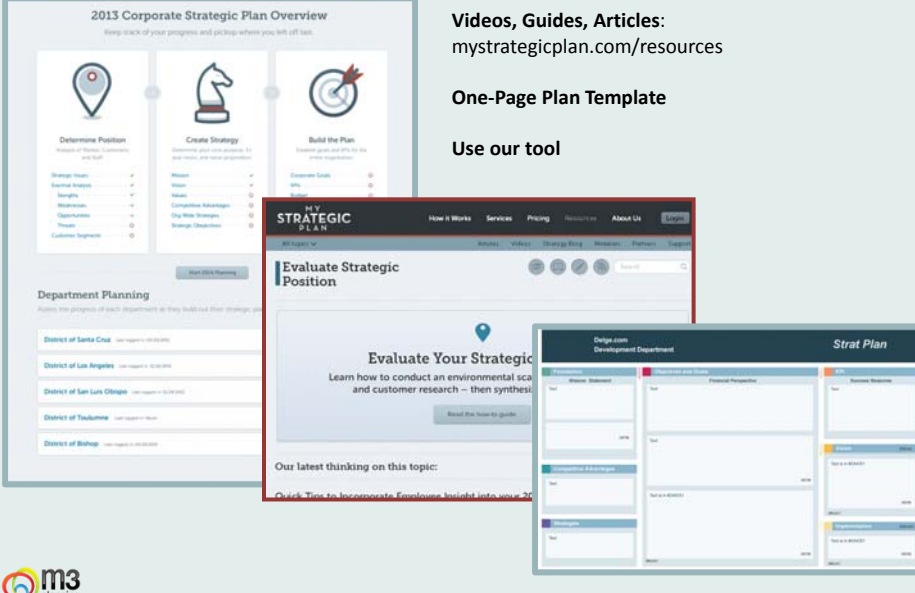




BENEFITS OF USING MYSTRATEGICPLAN

- MSP makes planning and executing fluid
- Allows for dynamic planning by easily adapt and make revisions that flow throughout the system
- Eliminating various versions of your plan
- Ability to develop consistent reports
- Ability to provide people within your organization with the information they need to execute
- Improving accountability throughout the organization by tracking performance numbers.

TOOLS TO USE - MYSTRATEGICPLAN.COM



2013 Corporate Strategic Plan Overview
Keep track of your progress and pick up where you left off last.

Determine Position
Assess internal capabilities and fit.

Create Strategy
Identify your core goals, fit, processes and core competencies.

Build the Plan
Develop goals and plans for the entire organization.

Department Planning
Assess the progress of each department as they build out their strategy plan.

Resources:
District of Santa Cruz
District of Los Angeles
District of San Luis Obispo
District of Tulare
District of Butte

Videos, Guides, Articles:
mystrategicplan.com/resources

One-Page Plan Template

Use our tool

Evaluate Strategic Position
Learn how to conduct an environmental scan and customer research – then synthesize.

Strat Plan
Detailed view of a strategic plan template with sections for Mission Statement, Vision, Core Values, Business Objectives, and Financial Projections.

m3 planning

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




CONTACT INFORMATION

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16