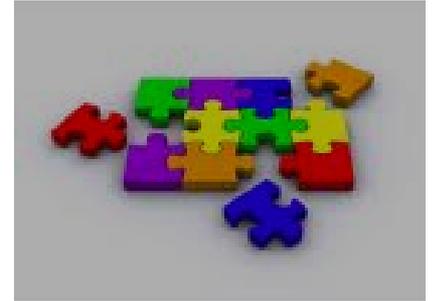




Strategic Planning Service

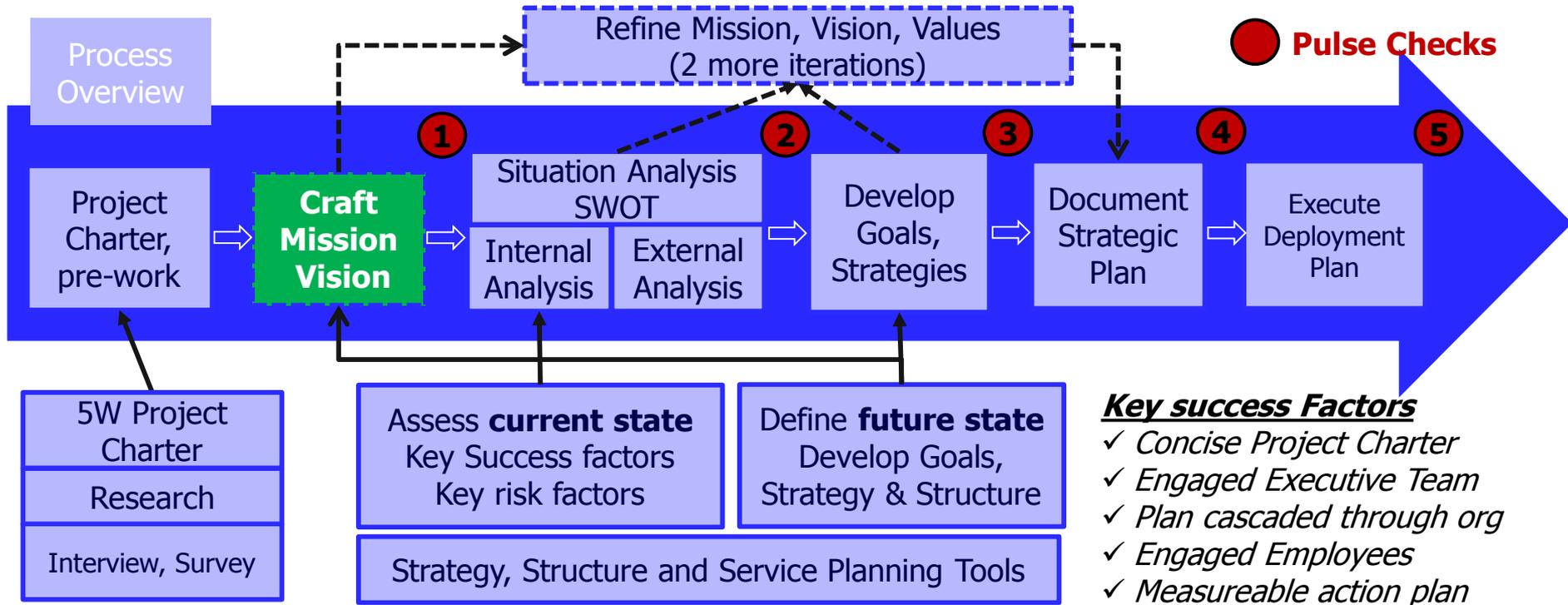


- Process Overview
- Strategic Planning Assessment (survey)
- SWOT
 - Internal Analysis
 - Strengths & Weaknesses
 - External Analysis
 - Opportunities & Threats
- Setting Goals & Strategy
- Cascading Strategic Planning
 - Cascade design
 - Linking the Balanced Scorecard
 - Employee empowerment

Planning tools utilized

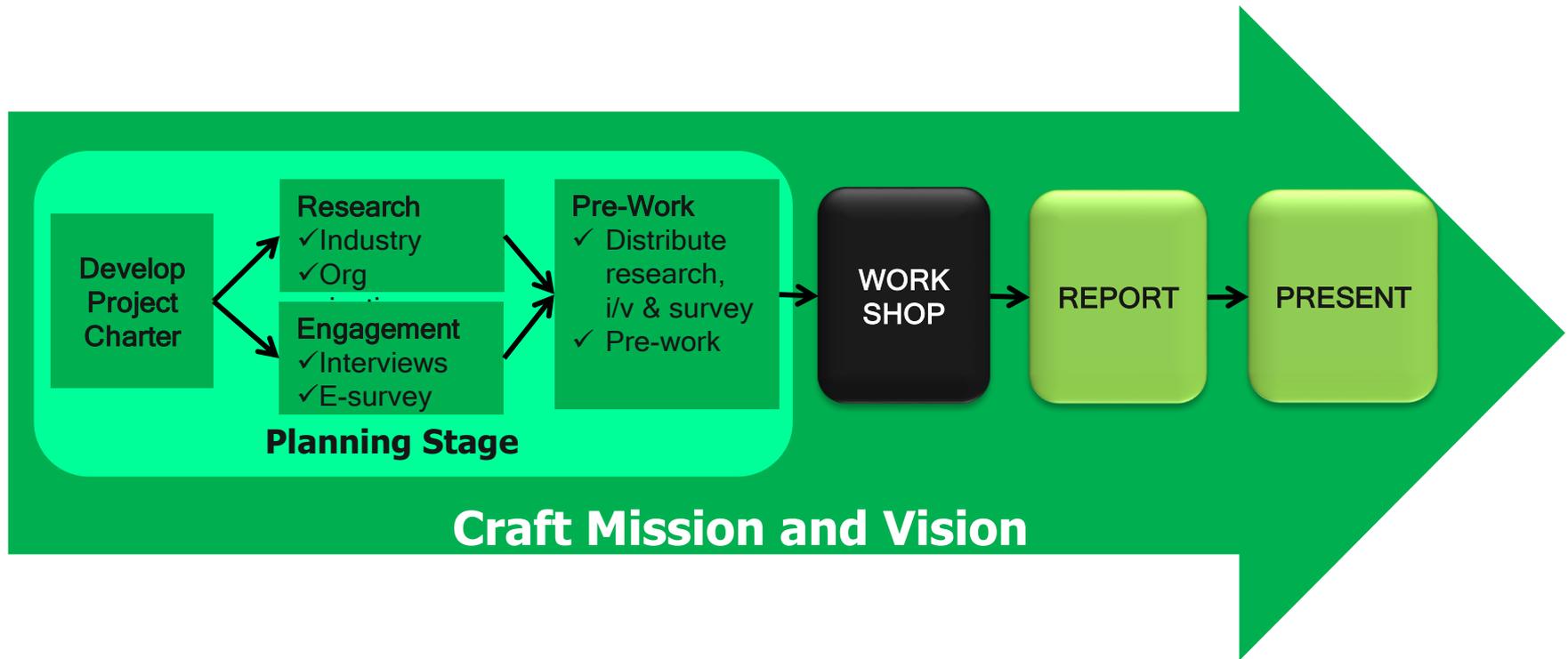
Value Chain Analysis
Porter's PEST, 5 Forces
Blue Ocean Strategy
Value Map, 4P's of Marketing
Growth / Share
Product / Market Matrix
Balanced Scorecard
Stakeholder Maps

Strategic Planning Process



**Strategic Planning Process really begins at the last step -
“Cascade to the Organization”**

Crafting Mission Vision Values



Name: _____ Organization: _____ Title: _____



STRATEGIC PLANNING PROCESS (SPP) ASSESSMENT

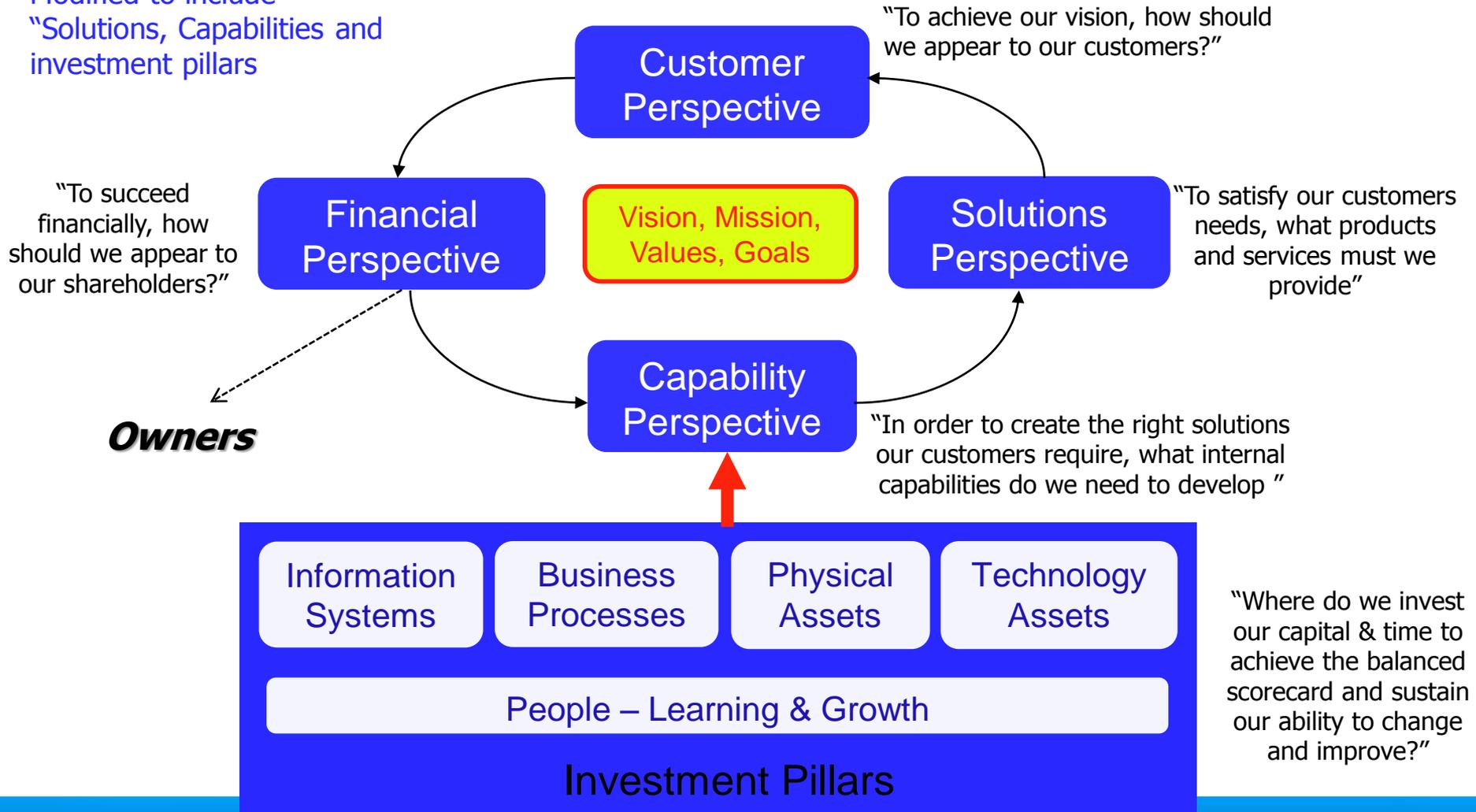
| | Ranking | | | | | Alignment | | | | | | |
|---|-----------------------------|--------------------------------|-----------------------------|------------------------------|------------------------|--------------------|-------|-------|----------|------------|----------|--------------|
| | 1= No, Not effective at all | 2= Yes, To a very small extent | 3= Yes, Partially effective | 4= Yes, Reasonably effective | 5= Yes, Very effective | Process Definition | W/ign | Level | Vertical | Horizontal | Measures | Support LEAN |
| 1) Is a Strategic Plan produced and/or updated annually before the start of the new fiscal year and how effective is it? Consider whether it is documented, communicated, understood and followed. | | | | | | | | | | | | |
| VISION | | | | | | X | X | X | | | | |
| Has a vision statement been established? | | | | | | X | X | X | | | | |
| If so, does it motivate you or your staff? | | | | | | X | X | X | | | | |
| Has it been communicated to your org? | | | | | | X | X | X | | | | |
| Do you think employees understand it? | | | | | | X | X | X | | | | |
| MISSION | | | | | | X | X | X | | | | |
| Has a mission statement been established? | | | | | | X | X | X | | | | |
| If so, does it motivate you or your staff? | | | | | | X | X | X | | | | |
| Has it been communicated to your org? | | | | | | X | X | X | | | | |
| Do you think employees understand it? | | | | | | X | X | X | | | | |
| VALUES | | | | | | X | X | X | | | | |
| Have the company values been established? | | | | | | X | X | X | | | | |
| If so, does it motivate you or your staff? | | | | | | X | X | X | | | | |
| Has it been communicated to your org? | | | | | | X | X | X | | | | |
| Do you think employees understand it? | | | | | | X | X | X | | | | |
| STRATEGIC GOALS | | | | | | X | X | X | | | | |
| Have company wide strategic goals been established? | | | | | | X | X | X | | | | |
| Do they motivate you or your staff? | | | | | | X | X | X | | | | |
| Has it been communicated to your org? | | | | | | X | X | X | | | | |
| Do you think employees understand it? | | | | | | X | X | X | | | | |
| Have you established goals for your functional group? | | | | | | X | X | X | | | | |
| Are the results measured periodically against the goals and communicated to staff? | | | | | | X | X | X | | | | |
| 2) Does your company produce an Annual Operating Plan before the start of the new fiscal year and how effective is it? Consider whether it is documented, communicated, understood and followed. | | | | | | X | X | X | | | | |
| Does it include financials? | | | | | | X | X | X | | | | |
| Does it include a document explaining assumptions? | | | | | | X | X | X | | | | |
| Does it include company and organizational goals? | | | | | | X | X | X | | | | |
| 3) Has your company produced a Strategic Planning Process, and is it effective? Consider whether it is documented, communicated, understood and followed. | | | | | | X | X | X | | | | |
| Is there a flowchart explaining the process? | | | | | | X | X | X | | | | |
| Is there a timeline explaining deliverables? | | | | | | X | X | X | | | | |
| Does the flowchart and timeline include cascading it to all levels of the org? | | | | | | X | X | X | | | | |
| 4) Is the strategic plan, operating plan, and SPP communicated and understood in a consistent way across all levels of the organization (ie executives, sr mgrs, mgrs and employees)? | | | | | | | X | | | | | |
| a) do managers and executives feel SPP expectations are well understood by employees? | | | | | | | X | | | | | |
| b) do employees feel SPP expectations are well understood by managers & executives? | | | | | | | X | | | | | |
| 5) Are the inputs and outputs from the SPP (Strategic Planning Process) to other key business processes documented, communicated, understood and improved upon on an ongoing basis? | | | | | | | | X | | | | |
| Rank understanding of inputs/outputs from SPP to Order Generation Process | | | | | | | | X | | | | |
| Rank understanding of inputs/outputs from SPP to Order Fulfillment Process | | | | | | | | X | | | | |
| Rank understanding of inputs/outputs from SPP to Customer Service Process | | | | | | | | X | | | | |
| Rank understanding of inputs/outputs from SPP to New Product Development Process | | | | | | | | X | | | | |
| 6) To what extent are the roles and responsibilities AND inputs and outputs of the Strategic Planning Process understood by the other key functional organizations? | | | | | | | | X | | | | |
| a) Rank Sales separately | | | | | | | | X | | | | |
| b) Rank Operations separately | | | | | | | | X | | | | |
| c) Rank Engineering separately | | | | | | | | X | | | | |
| d) Rank Customer Service separately | | | | | | | | X | | | | |
| e) Rank product development separately | | | | | | | | X | | | | |
| 7) Does the strategic plan and/or annual operating plan provide key business results and/or key performance indicators that you can easily relate to? | | | | | | | | | X | | | |
| How about Customers? | | | | | | | | | X | | | |
| How about Suppliers, Vendors? | | | | | | | | | X | | | |
| how about Employees? | | | | | | | | | X | | | |
| how about the EOC? | | | | | | | | | X | | | |
| how about the Board? | | | | | | | | | X | | | |
| how about the Owners? | | | | | | | | | X | | | |
| 8) Are people trained on the documented processes and tools in an effective manner to develop and execute the Strategic Planning Process, the strategic plan, and the annual operating plans? | | | | | | | | | | X | | |
| 9) To what degree does the SPP (Strategic Planning Process) support the following principles? | | | | | | | | | | | X | |
| - creating/improving customer value? | | | | | | | | | | | X | |
| - improving process efficiency? eg. reducing the time to get/process an order? | | | | | | | | | | | X | |
| - eliminating waste? ie. Not creating cust value, wasting the customers time, etc | | | | | | | | | | | X | |
| - creating an empowered problem solving culture? ie. initiative to improve the process | | | | | | | | | | | X | |

- Mission
- Vision
- Values
- Goals
- Process, Tools
- Metrics
- Employee empowerment
- Annual Operating Plan
- Cascading

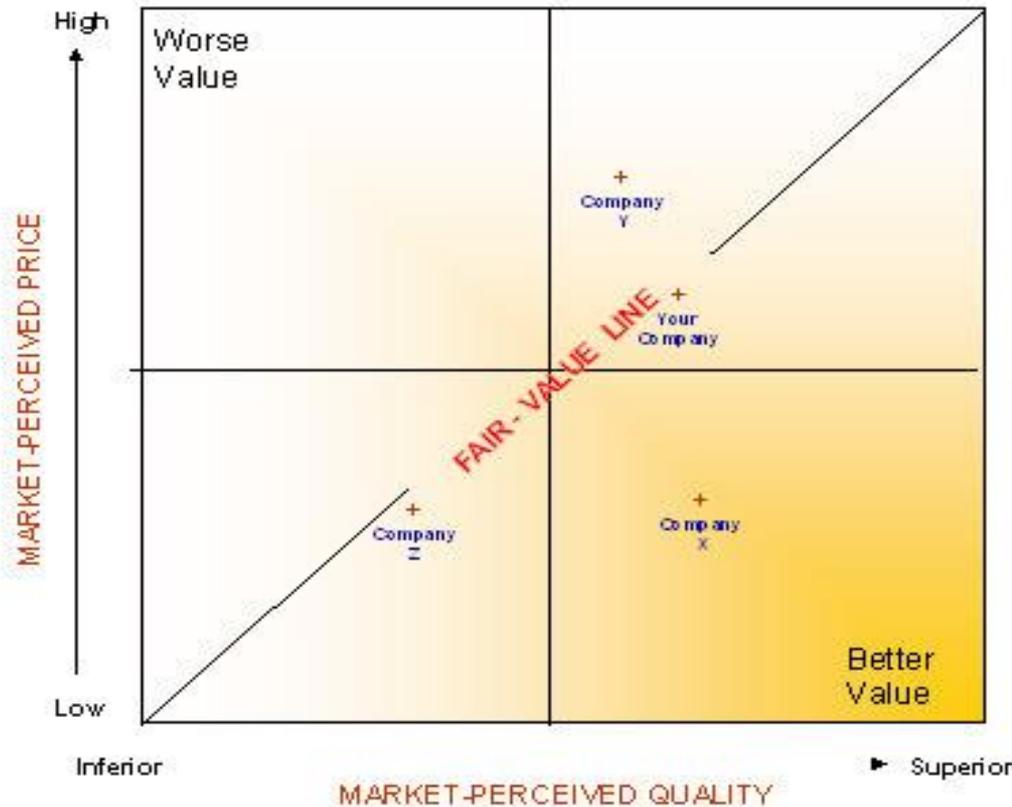
Balanced Scorecard (modified)

Source: Kaplan and Norton

- Modified to include "Solutions, Capabilities and investment pillars



Value map – quadrants

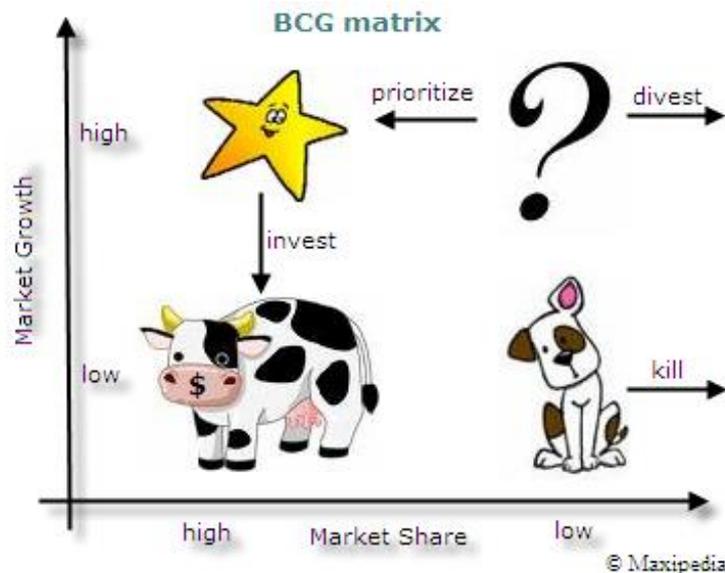


For a given set of known product offerings, at specific points in time, customers are likely to internalize, a perspective as what constitutes a fair value.

This relationship can be conceptualized as a fair value line with each point on the line representing a specific combination of benefits and price that is considered a fair value by the market.

Growth / Share Matrix

The Growth / Share matrix (aka BCG-matrix) helps corporations analyze their business units or product lines and allocate resources. It has two controlling aspect namely relative market share (meaning relative to your competition) and market growth. You would look at each individual product in your range (or portfolio) and place it onto the matrix. You would do this for every product in the range. You can then plot the products of your rivals to give relative market share.



Dogs. Products with low share, low growth. They do not generate cash for the company, they tend to absorb it. Kill.

Cash Cows. Products with high share, low growth. Cash Cows generate more than is invested in them. Keep.

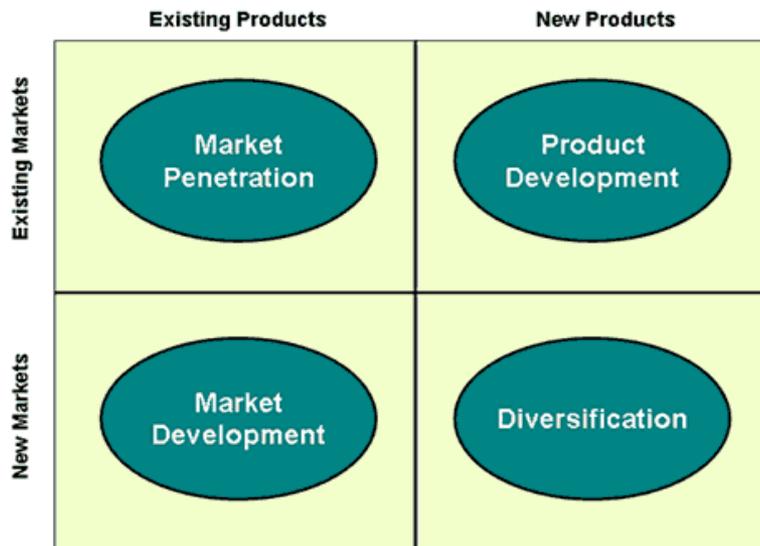
? Problem Children. Products with low share, high growth. They consume resources and generate little in return.

Stars. Products that are high growth markets with a relatively high share of that market. Stars tend to generate high amounts of income. Keep and build your stars.

Define strategy to balance your portfolio

Product / market matrix

The Ansoff Product-Market Growth Matrix is a marketing tool which helps businesses consider ways to grow via existing and/or new products, in existing and/or new markets – there are four possible product/market combinations.



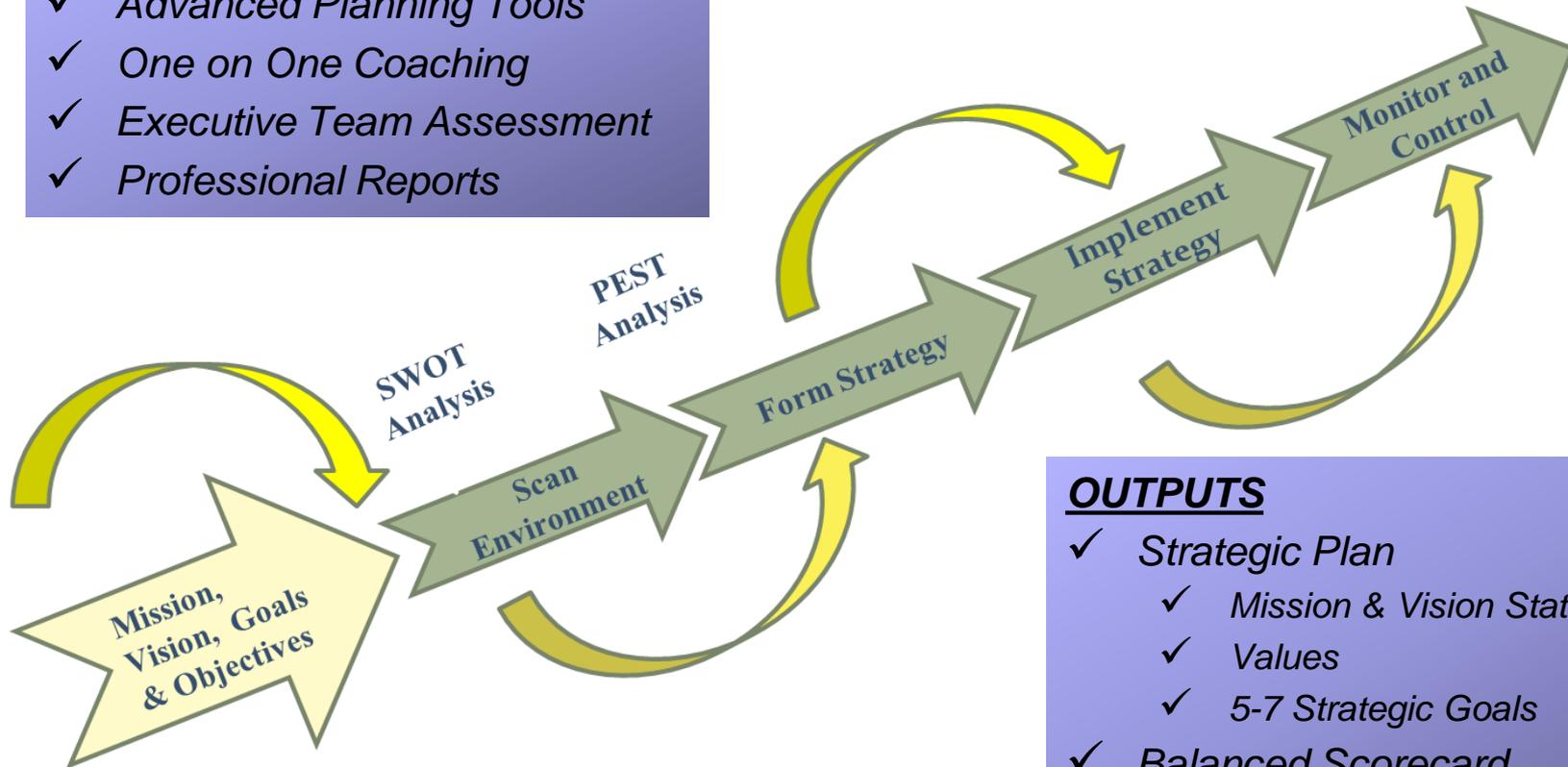
Market Penetration – takes existing customers share (red bloody ocean, organic growth). Lowest risk, lowest reward.

Product Development – new products onto existing market. Example McDonalds “burger of the month”. Strategy – attract new customers and pull through.

Market Development – existing products into new markets. Example would be “go out of province” to acquire an insurance company.

Diversification – entering new markets with new products. Example - Virgin Group to leverage their brand. High risk / cost , potential high reward.

- ✓ *Presentations & Surveys*
- ✓ *Advanced Planning Tools*
- ✓ *One on One Coaching*
- ✓ *Executive Team Assessment*
- ✓ *Professional Reports*



OUTPUTS

- ✓ *Strategic Plan*
 - ✓ *Mission & Vision Statement*
 - ✓ *Values*
 - ✓ *5-7 Strategic Goals*
- ✓ *Balanced Scorecard*
- ✓ *Cascading Process*