

# STRETCH STRATEGIC BOOTCAMP



## *STRATEGY IN MOTION*<sup>TM</sup> TOOLBOX

# STRATEGY *IN MOTION*<sup>TM</sup>

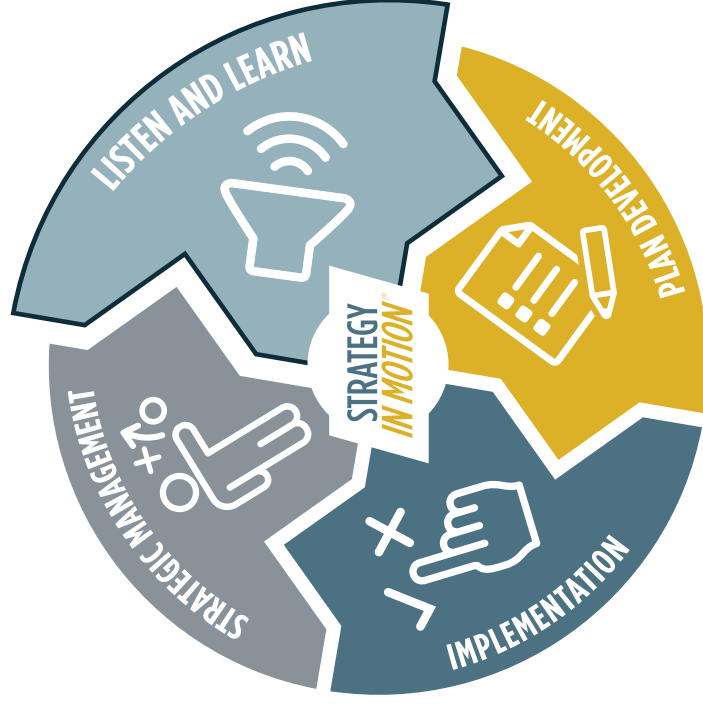
- 1 LISTEN AND LEARN**
  - » Complete strategic assessment
  - » Understand stakeholder goals
  - » Listen to employees and customers
  - » Analyze external environment
- 2 PLAN DEVELOPMENT**
  - » Agree on current reality
  - » Define desired state
  - » Determine strategic choices
  - » Outline strategic priorities
- 3 IMPLEMENTATION**
  - » Create scorecards and plans
  - » Update structure
  - » Link to teams
  - » Communicate to organization
- 4 STRATEGIC MANAGEMENT**
  - » “Look up” monthly
  - » Assess quarterly
  - » Update annually
  - » Invest in training



# PHASE 1

# LISTEN AND LEARN

- » **Complete** Strategic Assessment
- » **Understand** Stakeholder Goals
- » **Listen** to Employees, Customers, & Advisors
- » **Analyze** the External Environment



## TOOLS

- » Strategic Planning Process Assessment
- » Strategic Planning Team
- » Stakeholder Goals
- » Current Momentum
- » Strategic Survey
- » Board / Advisor Survey
- » Key Customer Interview
- » Competitor Analysis
- » 7 Factors Analysis



COMPANY: DATE:	Y	N	D/K
<b>Listen and Learn (Data-Gathering)</b>			
1. We have <u>analyzed our Customers</u> by revenue and profit. We know our Ideal Client.			
2. We have <u>analyzed our Competitors</u> by products and markets and know the top five. We identified their biggest strengths, weaknesses, and threat level.			
3. We have <u>analyzed the Industry</u> and understand the key trends and challenges.			
4. We have <u>surveyed our Customers</u> and know why they buy from us (differentiators).			
5. We have gathered <u>strategic input from our Employees</u> (start, stop, and continue).			
6. We have three years of <u>past financial statements</u> (profit and loss).			
7. We have <u>segmented our products and markets</u> by revenue and profit.			
<b>Strategic Plan (Development)</b>			
8. We have a clear <u>Vision</u> (desired state) in writing and it has been communicated throughout the organization.			
9. We have documented Core Values (operating guidelines) and they are alive in our people systems and all employees know them.			
10. We have a clear <u>Purpose Statement</u> (the why) and our employees are inspired by it.			
11. We have three-year <u>Stakeholder Goals/Objectives</u> (revenue, profit, ROA, sales/employee, others) and the Leadership team understands them.			
12. We have <u>prioritized our SWOT</u> and have plans for the top three in each area.			
13. Our <u>Target Market</u> is clear and our marketing and sales efforts are focused on it.			
14. We know our <u>Strategic Differentiators</u> and measure our Brand Promise (uniqueness / differentiators).			
15. We have made Investment Decisions on each business segment (build, hold, or divest).			
16. We have identified our <u>top Strategic Priorities</u> with champions and measures of success.			



17. We have a <u>documented strategic summary</u> with key future assumptions identified.			
18. We have weekly/monthly dashboards measuring our <u>Key Performance Indicators</u> with clear owners and targets.			
19. We have developed a <u>Strategic Scorecard</u> with owners, objectives, measures, targets.			
20. We have written <u>Action Plans</u> for each key initiative.			
21. We have created the Annual Business/ <u>Operational Plan</u> and Budget.			
22. We have developed a Three to Five-Year <u>Strategic Budget</u> .			
<b>Implementation Plan (Assessment and Follow-up )</b>			
23. We have a <u>Strategic Team</u> in place with scheduled weekly meetings.			
24. We review the <u>Results Gaps</u> for the Strategic Scorecard (actual vs. target).			
25. Strategic Priority teams review and update <u>Priority Action Plans</u> monthly.			
26. We hold a <u>Strategic Quarterly Assessment</u> and annual all-day planning update.			
27. We have a <u>Strategic Communication Plan</u> for the Organization, including strategic updates.			
28. We have a <u>Strategic Planning Manual</u> and training plan.			
29. We have a <u>Board</u> in place and gather their input on strategic issues.			
30. We have <u>linked the strategy</u> throughout the organization (departments, teams, individuals).			



### Guidelines to Consider

- Strategic "Planning" team should be 6-8 people.
- Members of the Executive team should be on the Strategic Planning Team.
- This may or may not be the same team that continues as the "Strategic Team" or "Leadership Team" moving forward. Meaning - may engage people on the planning team, that may not continue be on Leadership team today.
- This process is great opportunity for Professional Development so want to make sure we involve key people, esp those we see taking on more leadership responsibilities.
- We want the Strategic Planning teams to fully engage in process and feel like they own their business unit strategic plan.
- Need to make sure all key functions are represented, including "shared services".
- Key Company Stakeholders will provide stakeholder goals and expectations of the team and process.

Potential	Key Function Represented						Key Lead	Has Cap	Strat Thk	Pos Att	Div Tht	Comments
	Pres	Sales	HR	Mkt	Fin	Ops						
Ex. Barbara Smith	X					Y	Y	Y	Y	Y	Y	Good fit

Key Lead – Key leader in the organization and will benefit from Professional Development. Y/N

Has Cap – Has capacity to dedicate to the strategic planning process and will not be overwhelmed. Y/N

Strat Thk – Has ability to strategic thinker, has new ideas, thinks big/visionary. Y/N

Pos Att – Displays a positive attitude and represents core values, most of the time 😊 Wants to be included. Y/N

Div Tht – brings a different perspective to the team due to diverse background, experience, length of time. Thinks differently. Y/N





	BASE	+1	+2	+3	+4	+5
<b>Sales (\$M)</b> What revenue goals do you have?						
<b>Profit (Gross or Net Margin (%))</b> What profitability goals do you have?						
<b>ROA (net profit/total assets)</b> What business ratios are critical to you?						
<b>Productivity (Net Sales/Employees)</b> How does productivity need to change?						
<b>What other goals are important to you?</b>						
<b>Culture</b>						
<b>Succession Plan / Leadership Transitions</b>						
<b>Operational</b>						
<b>Personal</b>						







Name (and Role):

- 1. WHAT ARE THE CRITICAL CHANGES IN YOUR INDUSTRY/MARKET?**  
Please list **key trends and challenges** in your industry to be considered in the next 2-3 years.
- 2. WHAT ARE ORGANIZATION'S PRIMARY STRENGTHS (ADVANTAGES)?**  
Consider the competitive advantages you have in the industry/market.  
*Strengths: Current capabilities that make you **superior** to your competition and will help you meet the most important needs of your customers. Ideally these are **measurable** differences.*
- 3. WHAT ARE ORGANIZATION'S PRIMARY WEAKNESSES (DIS-ADVANTAGES / IMPROVEMENTS)?**  
Consider the competitive disadvantages you have in the industry/market.  
*Weaknesses: Areas in your **current capabilities that prohibit you from meeting your customers top ranked needs** or from gaining a competitive advantage. Weaknesses need to be fixed quickly to prevent irretrievable losses.*
- 4. PLEASE LIST THE TOP 3 MOST PROMISING AND POTENTIALLY PROFITABLE OPPORTUNITIES (GROWTH AREAS)** to actively and aggressively pursue for Organization. Consider the external environment and taking advantage of trends and challenges in our industry/markets.  
These should focus on ways to grow and/or help the organization become more cost effective.  
*Opportunities: Trends, events and ideas that you may capitalize on **to increase results and enhance your business**. Opportunities may be either internal or external, such as, new technology, cost reductions, greater geographic coverage, etc.*
- 5. PLEASE LIST THE TOP 3 MOST DANGEROUS AND POTENTIALLY DEVASTATING THREATS (BLIND SPOTS)** facing Organization. Consider the external environment and focus on threats over which you have a degree of control.  
*Threats: Possible events **outside of your control** that you need to plan for or decide how to mitigate.*
- 6. WHAT IS THE PURPOSE OF THE ORGANIZATION?** Beyond making a profit... what is the ultimate reason (The Why?) you are in business?
- 7. WHAT ARE THE ORGANIZATION'S CORE VALUES?** Essential characteristics that define successful team members?
- 8. WHAT IS YOUR ORGANIZATION'S VISION?** Where do you see Organization in 5 to 10 years?
- 9. WHAT ARE THE MAJOR STRATEGIC ISSUES (KEY QUESTIONS)** which need to be addressed?
- 10. WHAT IS THE MOST IMPORTANT FOCUS AREA FOR NEXT YEAR?**
- 11. PLEASE SHARE BARRIES TO SUCCESSFUL IMPLEMENTATION OF A STRATEGIC PLAN?**
- 12. PLEASE ADD ANY OTHER COMMENTS AS INPUT** into the strategic planning process.



NAME:

DATE:

1. What are the Organization's primary strengths? Consider what makes the organization unique and gives them a competitive advantage.  

---

---
2. What are the Organization's primary weaknesses? Consider what is holding the organization back and the competitive disadvantages they have in their industry/markets.  

---

---
3. Please list the most promising and potentially profitable opportunities for the Organization to actively and aggressively pursue.  

---

---
4. Please list the most dangerous and potentially devastating threats facing the Organization.  

---

---
5. Where do you see the Organization in 5 to 10 years?  

---

---
6. What are the major strategic issues (key questions) which need to be addressed?  

---

---
7. What is the most important focus area for next year?  

---

---
8. Please add any other comments as input into the strategic planning process.  

---

---



Script: Thank you for participating in this interview. Your insights will play an important role as TBD evaluates its business now and in the future. Below are the questions that will be covered during an in-person or virtual meeting. You do not need to prepare any answers; we are providing this in advance so you have ample time to think about the topics we'll be covering. Thank you for your time, Your feedback is a GIFT 😊

1. Where do you see your business in 3 to 5 years? What are your biggest concerns/threats?
2. Why have you chosen to work with ABC Organization? Please help us understand what makes ABC Org stand out or unique capabilities we have?
3. What does a successful partnership with our organization look like? What are your measures of success?
4. Are there other products or services we should offer?
5. What is your current satisfaction with ABC Org on a scale of 1 to 100? If you rated us below, 90%, would you mind sharing why?
6. What could ABC Org do better? Are there things they are doing that they should stop doing or areas of improvement compared to our competition?
7. What is your preferred communication method?
8. How likely is it that you would recommend ABC Org to a friend or colleague? 1-10



	TREND / CHALLENGE	+HELP -HURT	RESPONSE
<p><b>Markets/Customers/Products</b> How are the markets, customer needs/wants, and products changing?</p>			
<p><b>Socio-demographic</b> What are changes in demographic, psychographic, and social behavior that may impact your industry and customer?</p>			
<p><b>Competition</b> How is the competitive landscape changing, more/less/new competitors, substitutes products/services?</p>			
<p><b>Political/Government/Legislative</b> What are significant changes to regulations that may impact your industry?</p>			
<p><b>Economy</b> What are changes to economic indicators that may impact your industry?</p>			
<p><b>Factors of Production</b> What are changes to key “inputs” – i.e. qualified personnel, raw materials, capital – used to produce your products/services?</p>			
<p><b>Technology</b> What are changes to key products/services, manufacturing process, technology, and information systems to stay competitive?</p>			



<b>NAME OF COMPETITOR &gt;&gt;&gt;</b>			
<b>Person responsible for Research</b>			
<b>Ownership</b> <i>(who owns)</i>			
<b>Locations</b> <i>(local, regional, national)</i>			
<b>Target Market/Customer</b> <i>(scope of markets served)</i>			
<b>Marketplace Position</b> <i>(What are they known for? What is their tag line?)</i>			
<b>% Market Share</b> <i>(high, medium, low)</i>			
<b>Products/Services</b> <i>(scope of products/services)</i>			
<b>Pricing</b> <i>(higher than us, same, lower)</i>			
<b>Purpose, Values, Mission Statement</b> <i>(What do they have on website?)</i>			
<b>Growth Rate</b> <i>(increasing, stable, decreasing)</i>			
<b>Significant recent events</b> <i>(lost/gained big customer, leadership transitions, new products/services)</i>			
<b>Marketing/Advertising</b> <i>(How do they develop leads and build their brand – social media, key channels)</i>			
<b>Key Strengths</b> <i>(Competitive Advantages)</i>			
<b>Key Weaknesses</b> <i>(Competitive Disadvantages)</i>			
<b>Strategies</b> <i>(aggressive, lost passion, can't tell)</i>			
<b>Threat Level</b> <i>(high, medium, low)</i>			
<b>Our Strategy?</b> <i>(Be aggressive, protect, target customers/people)</i>			

# PHASE 2

# PLAN DEVELOPMENT



- » **Agree** on Current Reality
- » **Define** Desired State
- » **Determine** Strategic Choices
- » **Outline** Strategic Priorities

## TOOLS

- » SWOT: Internal / External Analysis
- » Strategic Plan: Current Reality
- » Strategic Plan: Desired State
- » Business Segmentation
- » Business Segment Forecast
- » Strategic Priority Plan
- » Strategic Plan: Strategic Choices
- » Key Strategic Concepts



**CURRENT REALITY**

(Environmental Scan - our plan is designed to live in this reality.):

<b>3-5-year Reality Assumptions</b>	<b>External (what are the key factors that will impact your organization)</b>	<b>Internal (what will be true internally about the organization)</b>

What is our Current State (where are we today)?

<b>SWOT Analysis - Internal</b>	<b>Strengths (Competitive Advantage, what do you do better than others)</b>	<b>Weaknesses (Competitive Disadvantage/Improvements, what is holding your back)</b>
	1.	1.
<b>SWOT Analysis – External</b>	<b>Opportunities (Growth Areas, key “external” activities to significant grow or improve the company)</b>	<b>Threats (Blind Sports, key “external” areas to protect against because they may blindside the company)</b>
	1.	1.



**DESIRED STATE**

(Purpose, Values, Vision, Goals)

<b>Company Purpose</b>	(The Why – why you do what you do)	
<b>Co. Core Values</b>	The How – essential characteristics that define success in your organization)	
<b>Vision</b>	(Desired State - where do you see the organization to be in 5-10 years)	
	Vision Themes	
	Vision statements (brainstorms)	
	10-year target:	
<b>3 Year Strategic Goals</b>	<b>Key Measures of Success</b>	<b>What does Success look like?</b>
<b>Date in 3 years</b>	Revenue: \$	<ul style="list-style-type: none"> <li></li> <li></li> </ul>
	Profit / EBITDA:	
	Other key Measures:	







**BUSINESS SEGMENT  
MARKET/PRODUCT FORECAST**

Time Period:

**P R O D U C T S   A N D   S E R V I C E S**

MARKETS	PRODUCTS / SERVICES	STRATEGY	SALES TYPE	Finish the year				Y3 forecast			Growth	Growth Details
				Base last year	current	+1	+2	+3				
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
		<b>Total</b>	Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Profit	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					
			Revenue	\$ -	\$ -	\$ -	\$ -			0.0		
			Cost	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!					
			Profit Margin	\$ -	\$ -	\$ -	\$ -					

M A R K E T S



<b>Strategic Priority:</b>		<b>Date:</b>	
<b>Champion (sponsor of Priority):</b> <b>Team (people responsible to deliver priority):</b>		<b>Revision:</b>	
<b>Background (why is this a strategic issue and critical for the organizational focus)</b>			
<b>Objectives and Outcome (s) (what does success look like)</b>	<i>SMART Goals - Specific, Measurable, Attainable, Realistic, Tangible</i>		

**Strategies - Key Initiatives/Projects (what are the big picture activities to make the priority successful):**

Strategy Key Initiative/Project	Project Owner / Project Team	Start Date	End Date	Cost	Measurement

**Additional comments:**

**Possible Barriers (challenges/issues/concerns to meeting the results and completing initiatives. What may get in the way, i.e. Resources, buy-in, training, etc.):**

What may get in the way?	What can we do to avoid this?	What do we do if it happens?

**Resources (what do you need to make this happen):**

Who do you need to help?	What do you need to spend money on?	Additional Comments





## STRATEGIC CHOICES

(Key Focus Areas and Investment Strategies)

<b>Business Definition / Core Focus</b>	(What specifically does your company do and for whom, consider your where you should win)
---	---

<b>Strategic Choices: Core Markets / Offerings</b>  (Marketing Strategy)	<b>Key (Target) Markets (where should we focus to win)</b>  Right Fit Client (Criteria to define our Ideal Customer)	<b>Key Products/Services (how will our offerings change)</b>
--	--	--

<b>Strategic (Core) Competency</b>	(Your Strategic Differentiator(s), what makes you unique/different, What is your Measurable Brand Promise)
------------------------------------	--

1-2 year Strategic Priorities (make or breaks to address strategic issues and achieve the vision)	Strategic Priorities	Outcomes (SMART Goals)

## STRATEGIC BUDGET

(What are the Expectations for Plan Delivery?)

*Strategic Budget (agreed upon expectations for this plan to deliver)	Base year	+1	+2	+3	+4	+5
Revenue						
% Target Market						
Margin						
Productivity						
Cash Flow						
ROE						
Others...						

*\*Track key assumptions for strategic budget.*





### PURPOSE

*"Why" we exist:*

### VISION

*Where we want to be:*

### 3-YR KEY ASSUMPTIONS

*Our plan is designed to live in this reality:*

### VALUES

*"How" we Operate to be successful:*

### 3-YR STRATEGIC GOALS

Date: 12/31/25    *What does this look like:*  
Revenue: \$ M  
Profit:

*Other Key Goals:*

### 3-YR STRATEGIC CHOICES

*Where will we win:*

Markets/Customer – where will you win?  
How will these change

New clients –

Offerings – what will you offer? How will these change?

Differentiation – how are you different/unique? TBD



### SWOT ANALYSIS [INTERNAL]

**STRENGTHS: Advantages**  
1.  
2.

**WEAKNESSES: Challenges**  
1.  
2.

### SWOT ANALYSIS [EXTERNAL]

**OPPORTUNITIES: Grow/Improve**  
1.

**THREATS: Blind Spots**  
1.

### Key Performance Indicators

[Specific, Measurable, Attainable, Realistic, Time-bound]

Perceptive	Measure	1-year Target
Finance		
Customer / Market		
Process /		
People / Learning and Growing		

### STRATEGIC PRIORITIES

Key priorities to reach our vision

Strategic Priority	1-year Outcomes

# PHASE 3

# IMPLEMENTATION



- » **Create** Scorecards & Action Plans
- » **Update** Structure
- » **Link** to Teams
- » **Communicate** to Organization

## TOOLS

- » Implementation Checklist
- » Strategy Scorecard
- » Run the Business Balanced Scorecard
- » Priority Action Plan
- » Team Meeting Calendar
- » 6 Core Strategic Questions



<b>Organization:</b>		<b>Date:</b>	
<b>President/CEO:</b>		<b>Process Owner:</b>	

**Strategic Planning Process**

What needs to be done?	Who will do it?	When will it be done?
Finalize Strategic Plan		
Finalize Priority Plans -Identify Champions and Team -Confirm Outcomes and Initiatives		
Complete short-term Action Plans		
Finalize Strategic Scorecard		
Finalize and update Operational Scorecard (KPIs)		
Complete a 3-5 year strategic budget		
Document a communication Plan and include visuals AND organizational communication		
Link strategic measures to operations/individuals		
Schedule Quarterly Reviews		
Clarify Team Structure including Executive Team, Operational Team and Strategic Planning Team (Team Meeting Calendar)		

**Monthly**

What needs to be done?	Who will do it?	When will it be done?
Hold Priority Task Team meetings to review progress		
Hold Strategic Team meetings to review strategic priorities and discuss external/internal changes		
Hold Operational Team and review run the business key performance indicators		







## IMPLEMENTATION CHECKLIST

Quarterly		
What needs to be done?	Who will do it?	When will it be done?
Update Priority Review Documents		
Update Strategic Scorecard with actuals		
Prepare agenda for Quarterly		
Hold Quarterly Review		
Determine Personal and Company Rocks for the next quarter		
Communicate strategic update to organization		
Annually		
What needs to be done?	Who will do it?	When will it be done?
Assess Process		
Update "Listen and Learn" tools (as needed)		
Hold Annual Update		



# IMPLEMENTATION

## STRATEGY SCORECARD CHANGE THE BUSINESS

SMART Goal	Champion(s)	Measures	Baseline	Current Year	+1yr Target	Target Milestones (Roadmap)				Actual Results		
						Q1	Q2	Q3	Q4	YTD Actual	Status	Projects / Initiatives Comments
<b>Priority #1</b>												
<b>Priority #2</b>												
<b>Priority #3</b>												





# IMPLEMENTATION

# RUN THE BUSINESS BALANCED SCORECARD

Balanced Scorecard Objective	Champion(s)	Measures	Baseline	Monthly Target	+1yr Target	Monthly				Actual Results		
						Jan	Feb	March	April	YTD Actual	% of Actual	Status / Comment
<b>Financial</b>												
<b>Customer / Market</b>												
<b>Internal Processes</b>												
<b>People/Learning/Organizational Development</b>												





## PRIORITY ACTION / PROJECT PLAN

<b>Priority:</b>		
<b>Key /Initiative/Project:</b>		<b>Owner:</b>
<b>Date:</b>		<b>Revision:</b>
<b>Standards of Performance</b> (key measures with target):		

Step #	Step	Start Date	End Date	Who	Who Else	Status/Comments

<b>Total Duration of Action Plan:</b>	<b>Latest Acceptable Completion Date:</b>

**Resources Needed (people, money, equipment, etc.):**

**Overall Comments:**





Meeting Name	Champion	Attendees	Frequency	Time/Day	Location	Primary Objective	Reports Provided
Executive Team	President/CEO	Key Executives	Weekly	1 hour	TBD	Review KPIs – key performance indicators Operational Issues Strategic Issues Resource Allocation	KPIs
Operational – Run the Business Review	COO / VP Operations	Run the Business Team (Key Department heads)	Weekly monthly	1 hour 2-3 hours	TBD	Manage KPIs Cross department communication – Department updates State of the business Operational Issues Strategic update	Run the Business Scorecard Follow-ups / Corrective Actions
Strategic - Change the Business Review	Strategic Process Owner	Strategic team	Monthly Quarterly	2-4 hour 4-8 hours	Conf room	External “Look up” Internal changes Assess strategic directions Address strategic issues	Priority reviews Strategy scorecard Updated action plans Rocks
Priority reviews	Strategic Priority Champions	Strategic Priority teams	At least monthly	4-6 hours a month	TBD	Keep Activities on track Manage challenges/barriers	Strategic Priority Plans Action Plans
Board of Advisors	President / CEO	3-5 Outside Advisors	Quarterly	4-6 hours a quarterly	TBD	External “Look up” Internal changes Assess strategic directions Discuss strategic issues Open Forum	Board book / info 1 week prior to meeting





## 6 Core Strategic Questions

<b>Company Purpose</b>	(The Why – why you do what you do?)
<b>Co. Core Values</b>	The How – what are the essential characteristics that define success in your organization?)
<b>Vision</b>	(Desired State - where do you see the organization to be in 5-10 years?)
<b>Business Definition / Core Focus</b>	(What specifically does your company do and for whom? Consider your where you should win.)
<b>Strategic Advantage</b>	(Your Strategic Differentiator(s), what makes you unique/different? What is your Measurable Brand Promise?)
<b>1–2-year Strategic Priorities (make or breaks to address strategic issues and achieve the vision)</b>	<b>Strategic Priorities</b>

# PHASE 4

# STRATEGIC MANAGEMENT



- » **Look up** Monthly
- » **Assess** Quarterly
- » **Update** Annually
- » **Invest** in Training

## TOOLS

- » Internal Strategic Planner: Certification Checklist
- » Quarterly Priority Review
- » Strategic Process Checklist



<b>COMPANY:</b> <b>STRATEGIC PLANNER:</b> <b>DATE:</b>	<b>Completion Date</b>	<b>Comments</b>	<b>Sign-off</b>
Books: Simplified Strategic Planning (Bradford and Duncan) Team-Based Strategic Planning (Fogg) Beyond Entrepreneurship (Collins and Lazier) - optional			
<b>Listen and Learn (Data-Gathering)</b>			
Articles: My Printer Broke True Strategic Leaders Feedback is a Gift Importance of Stakeholder Goals How to Conduct Research The Real Value of Strategic Planning MindTools			
Understand video, <a href="#">"What is Strategy"</a>			
Discuss the importance of the Strategic Planning "Process"			
Complete Strategic Planning Assessment / Audit tool			
Certification on Strategic Team Charter tool			
Complete Stakeholder Goals tool			
Certification of Current Momentum/Financial Analysis tool			
Certification of Strategic Survey tool (planning team, employees)			
Certification of Customer Survey tool			
Certification on Competitor Analysis tool			
Certification of Business Segmentation tool			
Certification of Market Segment Analysis			
Certification on Industry 7 Factors tool			





Certification of SWOT tool			
<b>Plan Development (Strategy)</b>			
Articles: Strategy is like Winning a Race Porter's Big Ideas Learnings from Best Managed Companies Future Framework Company's Purpose is Not its Vision Theory of Business			
Complete Current Reality (Key Assumptions and Prioritize SWOT)			
Complete Strategic Core Competencies (optional)			
Discussion of Ansoff Matrix			
Discussion of BCG matrix			
Discussion on GE-McKinsey			
Complete Desired State (Purpose, Core Values, Vision)			
Understand video, <a href="#">"What is your Why"</a>			
Understand video, <a href="#">"Draw your Future"</a>			
Complete Strategic Choices (Investment Strategy, Strategic Priorities)			
Understand video, <a href="#">"Playing to Win"</a>			
Complete Opportunity Assessment Tool			
Discuss Opportunity Business Plan Tool			
Certification on Working Draft of Strategic Summary Tool			
Certification on Strategic Priority Plan			
<b>Implementation (Roadmap)</b>			
Articles: Strategic Choices			



SMART Goals			
Mastering the Management System			
Certification Strategy (Change the Business) Scorecard tool			
Complete Action Plan Tool			
Complete Run the Business Balanced Scorecard tool			
Discuss 3-5 Strategic Budget			
Certification on Team Meeting Calendar			
Discuss Communications Plan / Strategic Infographic			
Discuss Department / Team Plans			
<b>Strategic Management (Update and Assess)</b>			
Articles: Leaders Look-Up Monthly Why Strategies Fail			
Discuss video, <a href="#">Leadership Lessons from Dancing Guy</a>			
Complete Priority Review tool			
Prepare and Facilitate a monthly meeting			
Complete Strategic Planning Checklist			
Document a Strategic Planning Binder			
Prepare and facilitate a monthly meeting			
Benchmark 2 other companies (visit and review process)			
Present learnings to Strategic Team			



Strategic Priority:	Champion:
Quarter:	Date:

<p><b>Outcomes:</b> Update Scorecard % Implementation for this Priority: What Outcomes are not on Target?</p>	<p><b>Accomplishments:</b></p>
<p><b>General Comments:</b></p>	<p><b>Issues/Challenge/Barriers:</b></p>

**Corrective Actions:** What needs to be done, who will do, by when:

Action	Who	Start	Complete by	Status/Comments

**Overall Status:**    On-track                      Fair                      Not-on-Track



STRATEGY IN MOTION™

# STRATEGIC MANAGEMENT



# STRATEGIC PROCESS CHECKLIST

Organization: \_\_\_\_\_

Date: \_\_\_\_\_

## Strategic Planning Process Checklist

Activity	Activity Owner	Update Frequency	Completion Date	Document Location	Leader Manual	Emp. Manual	Board Manual
<b>Listen and Learn</b>							
Customer Analysis (Top 10 by Revenue, Profit)							
Competitor Analysis (who, offerings, markets)							
Market Analysis (needs, market, share)							
Industry Analysis (5 forces – PEST, trends/challenges)							
Customer Survey (why do they buy from you)							
Employee Survey (Start, Stop, Continue)							
Past Financial statements							
Business Segmentation							
Organization Structure							
<b>Plan Development</b>							
Vision Framework (Purpose, Values, Vision)							
Stakeholder Objectives/Goals							
SWOT – Prioritized							
Target Markets							
Brand Promise / Differentiators							
Product/Service and Market investment strategies (Build, Hold, Divest)							
3-5 Goals and Objectives							
Strategic Priorities, outcomes, and team							

+1 513.807.6647 | DARCY@STRETCH-SL.COM | STRETCH-SL.COM



STRATEGY IN MOTION

# STRATEGIC MANAGEMENT



# STRATEGIC PROCESS CHECKLIST

Scorecard(s) (objectives, measures, targets) - Strategic and Operational									
Strategic Plan updated									
Action Plans updated									
Annual Business/Operational Plan and Budget									
1-3 year Key Hires Identified/Succession Planning									
3-5 year Strategic Budget									
<b>Implementation / Strategic Management</b>									
Strategic Team w/meetings									
Scorecard complete with Actuals									
Operational/Organization Team w/meetings									
Action Plans updated									
Strategic Quarterly Assessment (inc Annual update)									
Organizational Communication									
Strategic Planning Manual and training plan									
Board in place									
Board Communication/Input									

