



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>Plan Development (Putting the Plan Together)</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 and Strategic Management (Communication, 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).			