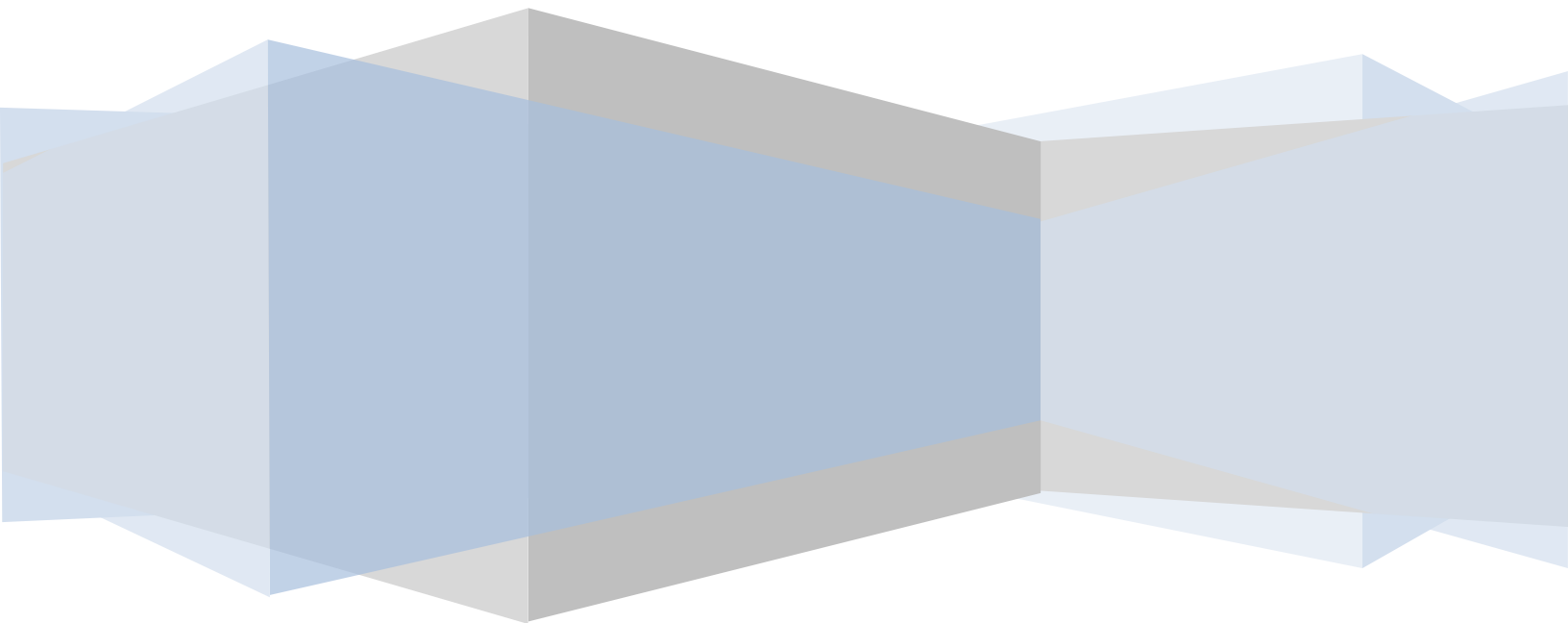


We'll Burn that Bridge When We Get to It

*Realistic Strategic Planning
for Small Organizations and Teams*

Stuart D. Meyer
Aligned Business Consulting





Stuart Meyer

As an executive coach and consultant, Stuart draws on 15 years of corporate experience and 15 years of coaching. He works with senior leaders and their teams to align their vision, goals and behaviors to achieve personal, career and organizational success.

Executive Transitions

Stuart has successfully coached hundreds of executives through career transitions, including CEOs, CFOs, VPs and Directors especially in marketing and technology fields. He is the author of *The Aligned Career Workbook: A Step-by-Step Guide to Landing Your Next Great Position*.

Leadership Coaching

In coaching individuals, Stuart's focus is on helping leaders accelerate the development of both their leadership and management skills. He works with clients in assessing their strengths and areas for improvement, creating a development plan, and provides on-going coaching, encouragement and accountability to help them achieve their goals.

Strategic Planning

In working with small and medium-sized organizations, Stuart supports the senior management team in the areas of strategy, accountability, and team alignment. Stuart helps teams clarify their mission and vision, develop a strategic plan, and increase accountability for achieving their goals. He often facilitates team meetings and off-sites.

Clients

Clients have included Apple, Google, Symantec, the San Francisco Giants, Lithia Motors, Harry & David, and many small to medium-sized companies and non-profit organizations.

Corporate Experience

- Co-Founder of the Workpath Group, a leadership coaching organization, coaching executives and managing a network of over 100 coaches worldwide.
- Vice President of Organizational Consulting for Right Management Consultants, coaching hundreds of executives through career transitions.
- Manager in Corporate Development at Apple, working on corporate strategy, technology licensing and divestitures.
- Director of Product Marketing at Xiox Corporation, managing sales channels, marketing communications, with additional roles in sales of software support and accounting.
- Accounting and Finance roles at Genentech and Fafco Solar Heating.

Education and Training

- MBA in High Tech Marketing and Bachelor's in Political Economics from U.C. Berkeley.
- Advanced Coaching Program with the Coaches Training Institute.
- Certified to consult with the Birkman, Myers-Briggs, and Lominger instruments.

Served on the boards of several private companies and non-profit organizations, including RidePal, Pacific Peninsula Group, MetricTest, Community Works and ScienceWorks Museum.

Stuart divides his time between working in the Silicon Valley in California and the Rogue Valley in Southern Oregon.

Table of Contents

Stuart Meyer bio.....	2
Table of Contents	3
The ABC Strategic Planning Process.....	4
The ABC Strategic Desired Outcomes.....	5
Participant Questionnaire	6
I. PRE-WORK	
The ABC Strategic Planning Pre-Work and Timeline	8
Offsite Agenda and Timeline	9
II. VISIONING	
The Current State	
Template.....	11
Example.....	12
Non-Profit Organization Template.....	13
The Future State	
Template.....	14
Example.....	15
Mission Statement revisited.....	16
III. KEY STRATEGIC INITIATIVES	
Brainstorming.....	18
Initial Ranking.....	19
Defining Key Strategic Initiatives.....	20
IV. PLANNING	
Group Decision-Making.....	22
Annual Action Plan	23
V. FOLLOW-UP	
VI. RESOURCES	
Recommended Strategic Planning Resources	26



The ABC Strategic Planning Process

Pre-Work – Understanding Our Environment

- ❖ Internal Analysis – Strengths and Constraints
- ❖ External Analysis – Opportunities and Risks
- ❖ Customer Analysis
- ❖ Off-Site Agenda and Timeline

Visioning – Where are we now, and where do we want to be

- ❖ Defining the Current State
- ❖ Defining the Future State
- ❖ Mission, Vision, Values, Core Competencies

Key Strategic Initiatives – Determining How to Reach Our Future State

- ❖ Identifying Strategic Options
- ❖ Choosing 3-5 Key Strategic Initiatives to Validate

Planning – Clarifying Specific Plans to Achieve Our Goals

- ❖ Setting Long-term Strategic Direction
- ❖ Setting 1 year Priorities and Targets
- ❖ Setting Quarterly Objectives
- ❖ Developing Action Plans: What, By Whom, By When, with What Resources

Follow-up – Using Our Strategic Plan for Accountability and Decision-Making

- ❖ Quarterly or Monthly Strategic Check-ins
- ❖ Quantifiable measurements and milestones
- ❖ Celebrating Accomplishments

ABC Strategic Planning Desired Outcomes

Preparation

How much time and effort should people spend in research and preparation? _____

Gather input and buy-in from participants:

- Participant survey; Participant meetings with facilitator

Alignment on Mission, Vision, Values, Key Competencies

√	Done, just need a reminder at off-site.	Some time to make sure it's still valid.	Need to do from the beginning.
Mission			
Vision			
Values			
Key Competencies			
Culture			

Meeting Components

Time horizon for Strategic Direction: 3 years; 5 years; 10 years; Other ____

What are the most important issues that need to be addressed?

-
-
-

Categories for Current and Future State

Key Strategic Initiatives

- Discussion of broad strategic options
- Decisions about specific strategic initiatives
- Annual Action Plan

Post-Off-Site

Format of results:

- 1 page summary; Several page summary; Comprehensive research with tables

Prepared by: _____

Follow-up Meetings: Monthly; Quarterly

Strategic Planning Team Buy-in Participant Questionnaire

Value of the Strategic Planning Process

I'll feel like this investment of time and money on planning was really worthwhile if we:

This planning process would frustrate me if we don't:

In order for this process to be successful, this must happen:

We should be done with this process by:

If we do this well, the results will be:

Company Status

Right now, it feels like (the company) is:

The things that are working well at (the company) are:

The things that are not working well at (the company) are:

I. Pre-Work



ABC Strategic Planning Pre-Work, Timeline

Pre-Work:	<u>Who</u>	<u>Start</u>	<u>Done</u>
Internal Analysis – Strengths and Constraints <ul style="list-style-type: none"> <input type="checkbox"/> Core Competencies <input type="checkbox"/> Financial factors <input type="checkbox"/> People factors <input type="checkbox"/> Facility factors <input type="checkbox"/> Technology factors <input type="checkbox"/> Production, systems, capacity factors External Analysis – Opportunities and Risks <ul style="list-style-type: none"> <input type="checkbox"/> Economic factors and assumptions <input type="checkbox"/> Government and regulatory factors and assumptions <input type="checkbox"/> Partners and alliances factors and assumptions <input type="checkbox"/> Suppliers <ul style="list-style-type: none"> <input type="checkbox"/> Resource suppliers <input type="checkbox"/> Capital suppliers – investors, banks, public markets <input type="checkbox"/> Labor Market Customer Analysis <ul style="list-style-type: none"> <input type="checkbox"/> Industry trends and factors <input type="checkbox"/> Market trends and factors <input type="checkbox"/> Competitive factors 			
Pre-Work Distributed to Participants			
Strategic Planning Off-Site/s			
Monthly or Quarterly Follow-Up			

Off-Site Agenda and Timeline

Start	Length	
		Overview of the process, ground rules, desired outcomes
		Identify our current stated Mission, Vision and Values
		The Current State – understanding where we are
		Review and discussion of SWOC and Customer Analysis
		Discussion of what part of the problem or opportunity we want to do, and not do
		The Future State – defining where we want to at a specific point in time
		Re-visit our Mission and Vision. Identify the necessary Values and Core Competencies necessary to get there
		Key Strategic Initiatives – what do we need to focus on to get there?
		Action Plan – Assigning what, by whom, by when
		Process for monitoring progress and accountability
		Wrap up and Evaluation

II. Visioning



The Current State – January 2014

Markets	Products & Services	The Organization
<p><u>Market Focus:</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪ 	<p><u>Product Offerings:</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪ 	<p><u>Key Financial Indicators:</u></p> <p>Revenues:</p> <p>Key Metric:</p> <p>Net Income:</p>
<p><u>Why Customers Return:</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪ 	<p><u>Services We Provide:</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪ 	<p><u>People, Culture Issues:</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪
<p><u>Competitive Advantages:</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪ 	<p><u>What Else Is The Customer Asking For?</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪ 	<p><u>Operational Factors:</u></p> <ul style="list-style-type: none"> ▪ ▪ ▪

The Current State – January 2014 example

Markets	Products & Services	The Organization
<p style="text-align: center;"><u>Market Focus:</u></p> <ul style="list-style-type: none"> ▪ Opportunistic ▪ Government ▪ Multi-process ▪ Bay area ▪ Short to medium run lengths 	<p style="text-align: center;"><u>Product Offerings:</u></p> <ul style="list-style-type: none"> ▪ Multi-page documentation ▪ Books and Catalogs ▪ Marketing Collateral ▪ Newsletters ▪ Magazines and Journals ▪ Direct Mail 	<p style="text-align: center;"><u>Key Financial Indicators:</u></p> <ul style="list-style-type: none"> ▪ Monthly Revenues: \$850K ▪ Profit Margin: 3% ▪ Net Income: \$20K/mo
<p style="text-align: center;"><u>Why Customers Return:</u></p> <ul style="list-style-type: none"> ▪ Broad capabilities ▪ Quality of service 	<p style="text-align: center;"><u>Services We Provide:</u></p> <ul style="list-style-type: none"> ▪ Digitally-integrated copying, printing, and direct mail ▪ Complete post-print services <p style="text-align: center;">In-house bindery</p> <ul style="list-style-type: none"> ▪ Fulfillment ▪ Delivery 	<p style="text-align: center;"><u>People/Culture Issues:</u></p> <ul style="list-style-type: none"> ▪ Experience, highly skilled people ▪ But, segmented and lack of unity ▪ And many are skeptical about our future because of too much changing direction.
<p style="text-align: center;"><u>Competitive Advantages:</u></p> <ul style="list-style-type: none"> ▪ Full range of services (leading edge digital, CTP, on demand, mini-book, bindery, mailing) ▪ High quality service (reputation, consistent estimating, on-time delivery) ▪ Union shop 	<p style="text-align: center;"><u>What Else is The Customer Asking For?</u></p> <ul style="list-style-type: none"> ▪ Faster, more accurate proofs ▪ Price Lists ▪ Quicker turnaround ▪ Help with digital files 	<p style="text-align: center;"><u>Operational Factors:</u></p> <ul style="list-style-type: none"> ▪ Lack of Strategic/Marketing Plan ▪ Too manufacturing and process driven, not enough customer driven

The Current State – January 2014 (non-profit version)

Issues or Needs We Address:	Services or Programs We Provide:	How We Operate:	The Organization
<ul style="list-style-type: none"> ■ ■ ■ ■ ■ 	<ul style="list-style-type: none"> ■ ■ ■ ■ ■ ■ ■ ■ ■ 	<p style="text-align: center;"><u>Funding Sources:</u> (\$ Amount; % of Funding) Government: Program Fees: Grants: Fundraising: Individuals, Board: Memberships:</p> <p style="text-align: center;"><u>Expense Categories:</u></p> <ul style="list-style-type: none"> ■ ■ ■ ■ 	<p style="text-align: center;"><u>People:</u></p> <ul style="list-style-type: none"> ■ Staff issues: ■ Board Issues: ■ Volunteer issues:
<p style="text-align: center;"><u>Who We Serve:</u></p> <ul style="list-style-type: none"> ■ ■ ■ ■ ■ 	<p style="text-align: center;"><u>Who Else Does This? What Do They Do?</u></p> <ul style="list-style-type: none"> ■ ■ ■ ■ ■ ■ ■ 	<p style="text-align: center;"><u>Marketing/Visibility:</u></p> <ul style="list-style-type: none"> ■ ■ ■ ■ 	<p style="text-align: center;"><u>Facility Issues:</u></p> <ul style="list-style-type: none"> ■ ■ ■ ■
		<p style="text-align: center;"><u>Alliances:</u></p> <ul style="list-style-type: none"> ■ ■ ■ ■ 	<p style="text-align: center;"><u>Other Issues:</u></p> <ul style="list-style-type: none"> ■ ■ ■ ■

The Future State – December 2015

Markets	Products & Services	The Organization
<p><u>Market Focus:</u></p> <ul style="list-style-type: none"> ■ ■ ■ 	<p><u>Product Offerings:</u></p> <ul style="list-style-type: none"> ■ ■ ■ 	<p><u>Key Financial Indicators:</u></p> <p>Revenues:</p> <p>Key Metric:</p> <p>Net Income:</p>
<p><u>Why Customers Return:</u></p> <ul style="list-style-type: none"> ■ ■ ■ 	<p><u>Services We Provide:</u></p> <ul style="list-style-type: none"> ■ ■ ■ 	<p><u>People, Culture Issues:</u></p> <ul style="list-style-type: none"> ■ ■ ■
<p><u>Competitive Advantages:</u></p> <ul style="list-style-type: none"> ■ ■ ■ 	<p><u>What Else is The Customer Asking For?</u></p> <ul style="list-style-type: none"> ■ ■ ■ 	<p><u>Operational Factors:</u></p> <ul style="list-style-type: none"> ■ ■ ■

The Future State – December 2015 example

Markets	Products & Services	The Organization
<p><u>Market Focus:</u></p> <ul style="list-style-type: none"> ▪ Strategic ▪ Multi-process ▪ Higher frequency/contract ▪ Short to medium run ▪ Northern California ▪ 	<p><u>Product Offerings:</u></p> <ul style="list-style-type: none"> ▪ Better quality proofs ▪ Better quality short-run color ▪ Direct Mail + 	<p><u>Key Financial Indicators:</u></p> <ul style="list-style-type: none"> ▪ Monthly Revenues: \$925K ▪ Profit Margin: 4% ▪ Net Income: \$37K/mo
<p><u>Why Customers Return:</u></p> <ul style="list-style-type: none"> ▪ Easier to do business with ▪ Variety of solutions 	<p><u>Services We Provide:</u></p> <ul style="list-style-type: none"> ▪ System fingerprinting ▪ Customer training and education ▪ Marketing planning and sales training 	<p><u>People, Culture Issues:</u></p> <ul style="list-style-type: none"> ▪ Team oriented ▪ Belief in company/ less skeptical ▪ Customer-oriented
<p><u>Competitive Advantages:</u></p> <ul style="list-style-type: none"> ▪ Full range of services ▪ High quality service 	<p><u>What Else Is The Customer Asking For?</u></p> <ul style="list-style-type: none"> ▪ Better quality short-run color (digital) ▪ In-line ink-jetting ▪ Update deferred maintenance ▪ ERP/MIS Upgrade ▪ Variable data printing 	<p><u>Operational Factors:</u></p> <ul style="list-style-type: none"> ▪ Need larger facility in SF ▪ Speed Supply Chain ▪ Sell excess inventory at wholesale

Our Mission Statement Revisited

The purpose of a mission statement is to define the long-term purpose of the organization; a statement that expresses what the organization aspires to be at some point in the long-term future. It should be broad enough to allow for growth and change in how the organization reaches its vision.

Steps to define a mission statement:

1. Identify who we serve;
2. Identify the marketplace in which we serve;
3. Identify what product or service we provide, in a broad sense;
4. Make it aspirational – a goal that we may never reach but hope to some day;
5. Not make it too long or wordy. Make it easy to remember – for employees, and for the target audience.

Here's an example that was developed for an in-school health care program:

The mission of Kids Health Connection is: ***“To ensure that every child in Jackson County have access to affordable health care.”***

Now, try it for your organization.

1. Identify who we serve:

2. Identify the marketplace in which we serve:

3. Identify what product or service we provide, in a broad sense:

So, a possible Mission Statement could be:

Now, make it aspirational, and not too long or wordy. Make it easy to remember – for employees, and for the target audience.

II. Key Strategic Initiatives



Key Strategic Initiatives Initial Ranking

	Initiative	Your Ranking	Group's Ranking
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Defining Key Strategic Initiatives

For each potential Strategic Initiative, define and describe each in greater depth.

Initiative: _____

Key components

Time frame: when able to begin, milestones, duration until initiative achieved

Financial and other resource requirements

Benefits and results: how it supports the mission and goals of the organization

IV. Planning



Group Decision Making

Method of Decision-making	Decision or Issue
Unanimous Decision	
Super-majority vote (2/3's majority, 3/4's majority)	
Majority vote	
Refer to a committee	
Person in charge decides after discussion	
Person in charge decides without discussion	

Annual Action Plan for 2015

STRATEGIC GOAL A:			
→ Objective #A1			
ACTIONS:	PERSON RESPONSIBLE:	BY WHEN:	STATUS:
1 st Quarter Actions:			
2 nd Quarter Actions:			
3 rd Quarter Actions:			
4 th Quarter Actions:			
→ Objective #A2			
ACTIONS:	PERSON RESPONSIBLE:	BY WHEN:	STATUS:
1 st Quarter Actions:			
2 nd Quarter Actions:			
3 rd Quarter Actions:			
4 th Quarter Actions:			
→ Objective #A3			
ACTIONS:	PERSON RESPONSIBLE:	BY WHEN:	STATUS:
1 st Quarter Actions:			
2 nd Quarter Actions:			
3 rd Quarter Actions:			
4 th Quarter Actions:			

V. Follow-up



VI. Resources



Recommended Strategic Planning Resources

Off-Sites That Work

by Bob Frisch and Logan Chandler, Harvard Business Review

Team-Based Strategic Planning; A Complete Guide to Structuring, Facilitating, and Implementing the Process

by C. Davis Fogg, AMACOM, 1994

The Self-Managed Organization; How Leading Companies Are Transforming the Work of Teams For Real Impact

Strategy Pure & Simple II: How Winning Companies Dominate Their Competitors

by Ronald E. Purser and Steven Cabana, The Free Press, 1998

Delivering Profitable Value: A Revolutionary Framework to Accelerate Growth, Generate Wealth, and Rediscover the Heart of Business

by

The Strategy-Focused Organization: How Balanced Scorecard Companies Thrive in the New Business Environment

by Robert S. Kaplan and David P. Norton

Strategy Pure & Simple II: How Winning Companies Dominate Their Competitors

by Michel Robert