



GOAL TREE (“Strategic Plan”)

I learned about CMTP’s Question-Based Planning as a director at Sauk Prairie Healthcare, where it’s been a repeat success; the one-page ‘goal tree’ really got my attention. At Culver’s, it helped our management team get and stay clear on the key issues. The plan helped us make real progress in every discipline. - Phil Keiser, CEO, Culver Franchising System, Inc.

Introduction

Traditional strategic planning is based on a military model from the 1950’s, with terms like mission, strategy, tactic, objective, logistics and so forth. The result is often a thick “strategic plan” binder no one uses. The Goal Tree breaks that habit. Used in conjunction with others of the Center’s tools, it can summarize the critical points of focus for everyone’s work as a team.



Benefits

The Center’s tools minimize omissions, improve communications and foster collaboration. The 1-page **Goal Tree**:

- Keeps the everyone, including the owners and board focused on the top issues
- Gives the leader a powerful tool in plan communication
- Traces everyone’s path of delegation—and advancement

Difficulty Highest
Estimated time required 20-30 hours over two months
Special skills All of them

Instructions

It’s possible simply to fill in this tool to improve clarity and focus for everyone. Another simple application is to abstract one’s current plan into this 1-page format. But choosing the right mix and balance of goals usually takes preparation and objective facilitation.

1. It’s helpful first to complete the 5-Year Look, Competitor Grid and Trends Outline.
2. But check for issues at The GM’s Index of Terms
3. Choose goals that involve every discipline and keep them measurable.
4. The Center’s trainers can help facilitate the entire process.

Members can contact the Center for assistance: info@theindex.net

Make It Better

Member should share ideas for improving any of the Center’s tools and how they’re taught and formatted. It’s also great to suggest new applications or brand-new tools.

LOGO

Strategic Plan: 2018-2020

Purpose

Our springs bring equipment to life. Their reliability and effectiveness serve silently for decades.

Vision

Five years from now, we will have doubled sales and, more important, we will have professionalized every aspect of our management. Family and non-family managers will enjoy a clear and stable organizational design that lets us make decisions in a timely, well-informed way. All our employees will see a life-long career path here with us.

Growth Goals

Net margin from 12 to 17.5%
Repeat sales from 70 to 80%
Plant retention from 67 to 75%

Strategies

1.0 MARKETING & SALES

Diversify, Accelerate, Thrill

2.0 OPERATIONS

Process, Process, Process

3.0 INFORMATION

Data, Discipline, Immediacy

4.0 HUMAN RESOURCES

Inspired, Flexible, Collaborative

5.0 FINANCE

Lasting Investments in Growth

Performance Goals (speed/cost/quality)

1.1	Increase revenue from new products from 5 to 15%
1.2	Improve proposal conversion rate from 67 to 75%
1.3	Decrease customer response from 12 to 4 hours
2.1	Decrease time to quote from 24 to 6 hours
2.2	Increase inventory turns from 5 to 7
2.3	Increase productivity from \$100K COGS/FTE to \$125K
3.1	Reduce management reports from 50 to 10
3.2	Increase Intranet data opens from 100 to 250/month
3.3	Reduce office tech lifecycle from 5 to 3 years
4.1	Reduce plant time to hire from 90 to 45 days
4.2	Increase cross-trained operators from 20 to 50
4.3	Improve rating of family managers to >3.5
5.1	Improve DCR from 1.2 to 1.33
5.2	Reduce COGS from 62 to 59%
5.3	Increase Days Cash in Hand from 180 to 240