

“Strategic” plans can actually *keep* organizations from their goals.

It’s frustrating “strategic” plans rarely produce results **and** cost so much **and** take so long. One CEO vented: *I just want everyone headed in the same direction—I don’t really care which one!*

Clarity at a glance

Plans are supposed to generate **clarity**, improve **teamwork** and produce **consistent results**. The goal tree on the next page does all these things.

Question-Based Planning answers the three core questions of leadership:

1. Why are we doing this?
2. Where are we going?
3. What’s the best way to get there?

The goal tree shows everybody where they’re headed and how they fit in. There aren’t too many goals, each goal is specific and inspiring, and **there’s a clear path of delegation**.

I learned about 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.

What a plan is and isn’t

This plan isn’t for start-ups; that’s a prospectus. Nor should it be a fat catalog of analyses. *A plan is the set of goals your managers are excited about.* It should use simple language because *clarity is everything.*

How to

Wordsmithing a “mission statement” is poor way to kick off planning. We begin by brainstorming

with your executives all the big questions your business faces. Agreeing on questions quickly gets everyone thinking in the same direction.

Question-Based Planning is completed in five 2-hour meetings over two months, with no retreats or big binders. The steps are:

1. Brainstorming all the big questions
2. Asking the questions of purpose and position
3. Exploring the departmental issues
4. Drafting the tree of goals and projects
5. Refining the tree and setting the plan

The two words of planning: **Goal. Project.**

The Tree’s goals integrate with our 1-page project summaries, which shows how each executive contributes to success. They build on best practices, **so you don’t constantly reinvent**.

The project plans for each goal help in delegation, sharing resources, and **freeing the CEO to focus** on the big picture.

Communication and follow-up are musts

Monthly progress and project meetings are essential discipline; after four months, one of our client’s managers said, *Now I see what I do helps you other guys!* Everyone will get how working under a plan leads to satisfying success.

The benefits at a glance

1. Shows direction and priorities at a glance
2. Shows everyone how they fit together
3. Traces everyone’s career path
4. Clarifies lines of delegation
5. Keeps directors focused
6. Makes accountability crystal clear

People love to work together in an inspiring cause. The goal tree helps the leader clearly communicate the plan and its results.

Please call Derrick Van Mell for information.



ACME WIDGET

2010/2011 Business Plan

This business plan and goal tree show how we can all work together to achieve something great; it makes our direction and priorities clear to everyone.

Our Widgets help people build great gadgets!

80% Repeat Business
40% Gross Margin
20% Market Share

Goals

