John Canfield – Speaker Introduction

Helping Clients Build High Performance Teams Since 1990

John Canfield is an experienced business executive and coach who has been trained to facilitate a wide variety of:

- Planning,
- Improvement Strategies,
- Creativity & innovation

John has many years of experience working and consulting in a wide variety of organizations around the world.

Prior to 1990 John was a Senior Engineering Manager for Intel Corporation and later Director of Corporate Quality and Design Research for Herman Miller.

John has a BA from Williams College (Political Science, Psychology) and a BS from University of Minnesota (Mechanical Engineering)
Speaker Introduction – John Canfield
Planning, Improvement, Innovation
Presentation Outline

1. Overview
2. Attendees
3. Prework
   3a. interviews
   3b. key decision charts
4. What to do
   4a. Room set up and materials
   4b. Ten Questions
5. How
6. Q/A
1. Overview
2. Attendees
3. Prework
   3a. interviews
   3b. key decision charts
4. What to do
   4a. Room set up and materials
   4b Ten Questions
5. How
6. Q/A
Performance and Thinking

- Improved Communities
- Improved Company Performance
- Improved Decisions, Behaviors
- Improved Insights and Ideas
- Improved Thinking
Intelligence and Thinking

We can consider that intelligence and thinking are different.

Intelligence is our innate capability, what we’re born with.

Thinking, on the other hand, is how we learn to use our intelligence, and as such, is a skill.
Thinking is a Skill

In one comparison, intelligence is the race car and it’s finite mechanical capabilities,

and thinking is the driver who can learn more and more about how to maximize the utility of the car.

As a skill, like bowling, golfing, cooking, etc., it can be actively improved.
Performance and Thinking

What “operating system” are you using?

Why would you upgrade your operating system on the same hard disk?
Performance and Thinking

Thinking is a Skill

- Improved Communities
- Improved Company Performance
- Improved Decisions, Behaviors
- Improved Insights and Ideas
- Improved Thinking

A key question is

*if I really want to improve, what’s the best way think about this?*
Performance and Thinking

1. Improved Company Performance
2. Implementation Skills
3. Improved Decisions, Behaviors
4. Collaboration Skills
5. Improved Insights and Ideas
6. Ideas Generating Skills
7. Improved Thinking
### Performance and Thinking

#### Idea Generating Skills

<table>
<thead>
<tr>
<th>Improve (Convergent)</th>
<th>Tactical</th>
<th>Strategic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Process Improvement Skills</td>
<td>Strategic Planning</td>
</tr>
<tr>
<td></td>
<td>Collaboration Skills</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Innovate (Divergent)</th>
<th>Creative Thinking Skills</th>
<th>Scenario Planning</th>
</tr>
</thead>
</table>

#### Implementation Skills

<table>
<thead>
<tr>
<th>One Project</th>
<th>Current Projects</th>
<th>New Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Project Management</td>
<td>Leading Change</td>
</tr>
<tr>
<td></td>
<td>Collaboration Skills</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Multiple Projects</th>
<th>Leading Teams</th>
<th>Leading an Innovative Organization</th>
</tr>
</thead>
</table>
1.1a Historical Review of Planning & Methodologies

The history of strategic planning begins in the military.

According to Webster's *New World Dictionary*, strategy is "the science of planning and directing large-scale military operations, of maneuvering forces into the most advantageous position prior to actual engagement with the enemy" (Guralnic, 1986).

Although our understanding of strategy as applied in management has been transformed, one element remains key: aim to achieve competitive advantage.

http://www.des.calstate.edu/history.html
1.1a Historical Review of Planning & Methodologies

Taking its name and roots from the military model, early models of formal strategic planning "reflected the hierarchical values and linear systems of traditional organizations.

Undertaken by elite planning function at the top of the organization, its structure was highly vertical and time-bound.

(Wall & Wall, 1995)
1.1a Historical Review of Planning & Methodologies

A certain period would be set aside to analyze the situation and decide on a course of action. This would result in a formal document. Once this was done, the actual work of implementation - which was considered a separate, discrete process - could begin"

(Wall & Wall, 1995).
1.1a Historical Review of Planning & Methodologies

BUSINESS

Strategic planning in organizations originated in the 1950s and was very popular and widespread between mid-1960s to mid-1970s, when then people believed it was the answer for all problems, and corporate America was "obsessed" with strategic planning.

Following that "boom" strategic planning was cast aside and abandoned for over a decade. The 1990s brought the revival of strategic planning as a "process with particular benefits in particular contexts" (Mintzberg, 1994).
Strategic Planning Documents

1. Mission
2. Principles or Values
3. Vision
4. Scoreboard
5. Business Environment
6. Goals or Objectives
7. Strategies
8. Action Plans
9. Plan Implementation Considerations
10. Plan Monitoring Considerations
Think of these documents as a hierarchy of intent, from the biggest ideas all the way down to the entries in your daily planner.

The purpose of specific titles for each document, technique, question is to allow each planning team member and employee use the terms the same way.

Select terms that would best fit in your organization.
Strategic Planning Process

Planning is an iterative process meaning as we move into exercises and documents later in a session, and learn something that would affect a previous document, we go back and improve it.

We want all the documents to be optimized as a whole.
Annual Planning Process

Strategic planning provides a macro multi-year view of where you want to go, and broadly how.

Annual planning provides a focused micro single-year view of how you will organize and exercise the resources necessary to achieve your strategic plan.

Annual Planning Process

1. Income statement
2. Balance sheet
3. Cash-flow analysis
4. Sales and marketing plan
5. Capital plan
6. Inventory plan
7. Organization charts
8. Compensation plan

Presentation Outline

1. Overview

2. Attendees

3. Prework
   3a. interviews
   3b. key decision charts

4. What to do
   4a. Room set up and materials
   4b Ten Questions

5. How

6. Q/A
Strategic Planning - Attendees

The participants to the planning session should represent the functions of an organization, the components of the company’s system: sales, marketing, service, human resources, etc.

I prefer for there to be only one representative to each department to keep the size of the planning team to less than 12.
Strategic Planning - Attendees

Can include

• Executive Leaders and their teams
• Divisional Managers and their teams
• Project Managers and their teams
• Supervisors and their teams

• Anyone who wants to improve their organization's results by developing effective thinking strategies to drive an organization's improvement and innovation initiatives
Presentation Outline

1. Overview
2. Attendees

3. Prework
   3a. interviews
   3b. key decision charts

4. What to do
   4a. Room set up and materials
   4b. Ten Questions

5. How
6. Q/A
To contribute to this meeting you will want to prepare and firm up your own hopes and strategies for what you believe your organization can accomplish.

We work to focus on data based positions vs. strong opinions.
Participants will benefit from spending time working through any planning preparation documents and their exercises alongside their copy of the organization’s current plan.

The better participants are prepared to present and discuss the important factors that contribute to their plan, the better plan they will build, and the better support they will develop as a team for their plan.

No participants in a planning session should plan to audit the session.
Regarding content you can only sing the songs you know.

I would encourage you in the days before we meet to expand your repertoire by nosing around in magazines, books, remarkable thinkers heads (young and old), client web sites, competitor web sites, etc etc. hunting for trends that you think your company can identify and take advantage of.

This is an important step. Plan on surprising your planning team with the breadth and quality of your ideas.
The point in your study is not become an expert at lots of new stuff, but rather a person who knows what’s likely going to be happening in the coming months and years, and is able to think about this before someone else, especially a competitor.

By proactively searching out new information about new events, you separate yourself from the many who wait to hear about it on the news.
People who discover things are not necessarily all that much brighter that the rest of us, they just thought about things first.

It’s not about capability, it’s about restlessness in wanting to know, recognizing many of the ideas that will contribute to products and services to be introduced in the next 5-10 years are today on someone’s workbench or desk, and not written about yet.

Find and learn from these people and you’re way ahead.
Presentation Outline

1. Overview
2. Attendees
3. Prework
   3a. interviews
      3b. key decision charts
4. What to do
   4a. Room set up and materials
   4b Ten Questions
5. How
6. Q/A
Strategic Planning – Interviews

I prefer meet in one-on-one interviews to help me learn more about you and your team, and for you to learn more about me and how we can work together.

This meeting should last about an hour. In these meetings I will ask the series of questions listed below to help you prepare your current thoughts about your company's business, and what you hope you and your team members can accomplish.
While the information from these meetings is helpful to me in structuring our following planning meeting, it is also completely confidential.

Interviewees choose if and when they want any of their information shared with the planning team. Please take a few minutes and review the questions by writing some brief notes for yourself about each of the questions.
Strategic Planning – Interviews

1. What is your business?
2. What are your business’s goals and measurements of success?
3. Who are the winner/loser businesses that are your competitors?
4. How should your business differentiate itself from its competitors?
5. What are the top five opportunities do you see for your business?
Strategic Planning – Interviews

6. What are the top five barriers to success do you see for your business?
7. What is your role in your business?
8. How do you measure your success and how do you like to be rewarded?
9. How would you describe your executive team?
10. If you were to write your team’s plan what would it look like?
Presentation Outline

1. Overview
2. Attendees
3. Prework
   3a. interviews
   3b. key decision charts
4. What to do
   4a. Room set up and materials
   4b Ten Questions
5. How
6. Q/A
Strategic Planning – Key Decision Charts

Developing Key Decision Charts

Each planning team member develops a Key Decisions Chart a few weeks before the planning session. Their chart outlines their department’s key decisions that need to be made within three time periods: Year 1, Years 2-3, and Years 4-5.

This can be developed on a flipchart or in an Excel spread sheet. The sheet has three columns (time periods) and five rows (five key decisions/support). Each of the fifteen cells would list the following information:

1. Topic:
   a. Decision to be made:
   b. Do I have the data to make the decision?
   c. Do I have the support to implement the decision?
### Strategic Planning – Key Decision Charts

<table>
<thead>
<tr>
<th>KEY DECISIONS CHART</th>
<th>Years 2 - 3</th>
<th>Years 4 - 5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Topic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Decision to be made:</td>
<td>same format as</td>
<td>same format as</td>
</tr>
<tr>
<td>b. Do I have the data to make the decision?</td>
<td>column 1</td>
<td>column 1</td>
</tr>
<tr>
<td>c. Do I have the support to implement the decision?</td>
<td>considering years 2-3</td>
<td>considering years 4-5</td>
</tr>
</tbody>
</table>

include up to 5 key decisions/actions/to do's

It is also helpful to assign a colored dot alongside the description of each topic’s data and support listings to indicate the author’s level of comfort with this task.

- **green** = on track
- **yellow** = needs some attention, speed bumps present
- **red** = roadblocks present
**Strategic Planning – Key Decision Charts**

<table>
<thead>
<tr>
<th>KEY DECISIONS CHART - EXAMPLE</th>
<th>Name - Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year 1</strong></td>
<td>Years 2 - 3</td>
</tr>
<tr>
<td>1. Site Consolidation</td>
<td></td>
</tr>
<tr>
<td>1a. Should we consolidate the operations currently at sites X and Y?</td>
<td></td>
</tr>
<tr>
<td>1b. <em>(data)</em> I need to know the financial implications across all the sites of completing this move. I need to consider the incoming demographics for the next 10 years.</td>
<td>same format as column 1 considering years 2-3</td>
</tr>
<tr>
<td>1c. <em>(support)</em> I need to know if the leaders of sites X and Y would support this move.</td>
<td></td>
</tr>
</tbody>
</table>
The meeting described here takes place a few weeks before a planning session. This is a collaborative dialogue session.

Each planning team member presents their chart to the planning team. The yellow and red dots provide some focus for the presentation “Here’s where I’m in need regarding a topic/decision/support – who can help me with recommended contacts, approaches, resources, etc?”
Strategic Planning – Key Decision Charts

As an example of a similar kind of meeting, imagine a group is assembling to build a sail boat. The participants represent expertise in sail making, hull building, anchor placement, cabin arrangements, etc.

As one person talks about their needs, the others, representing other components of the boat’s building, know plenty about how the presenter’s issues and questions affect their area of responsibility. Collaborative planning team members also respect that each presenter needs to win for the boat to be a success.

This deep dialogue provides the opportunity to identify and coordinate all the boat’s interdependent components. Woe be to the crew that assumes other members know what they need.
Strategic Planning – Key Decision Charts

Importantly the purpose of the presentation is not to look good.

This is a meeting to help the team recognize where they need to do some work to improve their ability to write a more effective strategic plan.

Honest presentation and feedback is crucial.
Presentation Outline

1. Overview
2. Attendees
3. Prework
   3a. interviews
   3b. key decision charts
4. What to do
   4a. Room set up and materials
   4b. Ten Questions
5. How
6. Q/A
Session Format - What to Expect

Participants sit at team tables facing a series of flipcharts (workbench) where the ideas for each agenda/step are placed as the participants generate them. We treat the series of flipcharts as a whole; if we get down the road and think of a good idea to include in an earlier step, we do so. Participants are focused on each step, engaged in idea generation and consideration, and up on their feet often to present ideas and reconfigure the flipcharts.

At the end of the session you will leave with the roll of completed flipcharts which will most likely be collated back in your office by administrative staff.
Strategic Planning – Room Set Up

I prefer large rooms (1500 square feet) with windows and lots of wall space. I like moveable smaller tables (4-6 people per table) with comfortable chairs.

I recommend planning teams sit at team tables facing a series of flipcharts (workbench) posted on a wall where the ideas (written on Post Its) for each planning step are placed as you generate them.
This meeting is a very interactive, hands-on, hard-work session. We will work at team tables, writing our ideas on Post Its, moving to flipcharts, and presenting our results to small and large groups.

Participants are focused on each step, one-at-a-time, engaged in idea generation and consideration, and up on their feet often to present ideas and reconfigure the flipcharts.
This photo shows one group reviewing their work; no projector/screen. Flipcharts on wall are sequenced in the 1-10 steps of the planning process. Room has good light (windows to speaker's left). Tables set to allow participants to view presenter without having to turn around. Great wall space. Great move around space.
Strategic Planning – Room Set Up

Materials include markers for flipcharts and Post Its, Post Its, flipchart stand and paper, and masking tape (blue if possible) to tape flipcharts up.

Do not use “permanent” markers, they can bleed through flipcharts and mark walls.

At the end of the session clients have a roll of completed flipcharts which will most likely be collated by their administrative staff.
Presentation Outline

1. Overview
2. Attendees
3. Prework
   3a. interviews
   3b. key decision charts
4. What to do
   4a. Room set up and materials
   4.b Ten Questions
5. How
6. Q/A
Strategic Planning – Ten Questions

This planning approach is directed at improving business performance.

This improved performance is the result of better decisions, and behaviors associated with the day-to-day communications used in conducting business.

Improved decisions and behaviors are the result of improved ideas and insights.
Strategic Planning Documents

1. Mission: "who we are, what we do"; ultimate intent of organization; no time constraint.

2. Principles or Values: "how we work together"; rules about how we treat ourselves, each other, and our community.

3. Vision: "where we want to be"; a long view, 3-5 years, of what must be accomplished to support the Purpose.
4. Scoreboard: "success as measured by..."; tactical or strategic; measurable performance expectations.

5. Business Environment: "playing field; even and uneven"; listing of internal and external promoting and restraining forces.

6. Goals or Objectives: "what to do next"; specific milestones of what must be accomplished in the next year to support the Vision. Usually three to five are useful.
Strategic Planning Documents

7. Strategies: "how to" accomplish Objectives while considering business environment requirements. Usually three to five per Objective are useful.

8. Action Plans: "to do assignments"; quarterly, prioritized action steps necessary to support the Objectives and Strategies. Usually three to five per Strategy are useful.
Strategic Planning Documents

9 Plan Implementation Considerations:
proliferation plans, announcements plan, budget plan, barriers.

10. Plan Monitoring Considerations: criteria and plan to monitor your progress
Strategic Planning – Data Gathering

a. Clarify the topic and process.

b. Generate ideas. Use Post Its; one idea per sheet, large writing.

Give each member 5 minutes alone to work quietly.
Strategic Planning – Data Gathering

c. Clarify ideas, each person presents one of their ideas at a time. Promote and provoke dialogue
We will want to identify some parameters for each of the following documents:

- intended audience,
- intended utility, and
- criteria describing an excellent example of each.

Strategic Planning Exercises

Exercise 1

| Audience | Leadership Team, Board, Customers |
| Utility  | SMARTS the Planning Process |
| Criteria | Easy to understand |

Purpose or Mission: "who we are, what we do"; ultimate intent of organization; no time constraint.

You might consider this your “elevator speech”, what you would say to introduce yourself in less than a minute.
Strategic Planning – Ground Rules

- Pareto principle
- Equifinality
- Reify
- Can’t will yourself
- Can’t realize…
Mission: "who we are, what we do"; ultimate intent of organization; no time constraint.

You might consider this your “elevator speech”, what you would say to introduce yourself in less than a minute.
Strategic Planning – 10 Questions

1. Mission

Example – Apple

Apple is committed to bring the best personal computing products and support to students, educators, designers, scientists, engineers, businesspersons, and consumers in over 140 countries around the world. (page 72, The Mission Book, Jeffrey Abrahams)
Strategic Planning – 10 Questions

1. Mission

Example – Avis Rent a Car

To ensure a stress free rental experience by providing safe, dependable vehicles and special services designed to win the customer’s loyalty. (page 79, The Mission Book, Jeffrey Abrahams)
2a. **Principles**: "how we work together"; rules about how we treat ourselves, each other, and our community.

**Example - Rotary International 2007-2010**

Conduct only activities that are

- the TRUTH.
- FAIR to all concerned.
- will it build GOODWILL and BETTER FRIENDSHIPS.
- will it be BENEFICIAL to all concerned.
2b. Values: "how we work together"; rules about how we treat ourselves, each other, and our community.

"What we stand for, why we exist. ...Enduring character of an organization - a consistent identity that transcends product or market life cycles, technological breakthroughs, management fads, and individual leaders" ..."the glue that holds an organization together as it grows, decentralizes, diversifies, expands globally, and develops workplace diversity (C/P p.66). ...role of core ideology is to guide and inspire, not differentiate. (C/P p.70) Collins & Porras
Strategic Planning – 10 Questions

2b Values: Example - Rotary International  2007-2010

Service  We believe that our service activities and programs bring about greater world understanding and peace. Service is a major element of our mission. Through the plans and actions of individual clubs, we create a culture of service throughout our organization that provides unparalleled satisfaction for those who serve.

Fellowship.
Diversity
Integrity
Leadership
3. **Vision**: "where we want to be"; a long view, 3-5 years, of what must be accomplished to support the Purpose.

"BHAGS" (big hairy audacious goals) promote a level of improvement that requires and delivers a new level of capability.
3. Vision

"This rare ability to manage continuity and change - requiring a conscientiously practiced discipline - is closely linked to the ability to develop a vision. Vision provides guidance about what core to preserve and what future to simulate progress toward.

"What we aspire to become, to achieve, to create - something that will require significant change and progress to attain."
3. Vision

General Electric Company, 1980's:

Become number one or number two in every market we serve and revolutionize this company to have strengths of a big company combined with the leanness and agility of a small company.
Strategic Planning – 10 Questions

3. Visions

Ford Motor, early 1900's: democratize the automobile

Sony early, 1950's: become the company most known for changing the worldwide poor-quality image of Japanese products.
### Strategic Planning – 10 Questions

3. Vision – Preferred Format

<table>
<thead>
<tr>
<th>Strategic Plan</th>
<th>Year 1</th>
<th>Years 2 - 4</th>
<th>Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objectives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve market share</td>
<td></td>
<td></td>
<td>45%</td>
</tr>
<tr>
<td>Improve profitability</td>
<td></td>
<td></td>
<td>21%</td>
</tr>
<tr>
<td>Improve employee retention</td>
<td></td>
<td></td>
<td>95%</td>
</tr>
<tr>
<td>Improve community reputation</td>
<td></td>
<td></td>
<td>#1 via surveys</td>
</tr>
</tbody>
</table>
Strategic Planning – 10 Questions

4. **Scoreboard**: "success as measured by..." tactical or strategic; measurable performance expectations.

**Example**

- **Quality** - defects, complaints, rework, etc
- **Cost** - operations costs, warranty, etc
- **Delivery** - on-time, right product/right place/right time, etc
- **Innovation** - new products, services, improvements, new business, etc
- **Safety** - days without accident, hours lost time, etc
- **Morale** - absenteeism, tardiness, turnover, etc
Strategic Planning – 10 Questions

A “Balanced Scorecard” leading AND lagging measurables.

leading
- learning and growth
- internal business processes
- proactive customer support

lagging
- financial
Strategic Planning – 10 Questions

5. Business Environment Analysis

Playing field; even and uneven"; listing of internal and external promoting and restraining forces.

5a Market considerations – product/customer matrix
5b Market considerations – voice of the customer, trends
5c Market considerations Competitors – Their support to your product/customer matrix
5d Market considerations – differentiation factors
5e Capacity considerations – core process review
5f Capacity considerations – boundaries: corporate, regulatory, political, technology, etc.
5g Summary – Prioritized Factors
### Strategic Planning – 10 Questions

#### Exercise 5 - Business Environment Considerations Matrix – Example

<table>
<thead>
<tr>
<th>Core Processes</th>
<th>Planning ABC</th>
<th>DEF GHI</th>
<th>Customers/Products</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>PMS</th>
<th>PSE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Competition</strong></td>
<td>+ ABC Notable (Last leader)</td>
<td>+ WFP High reputation</td>
<td>+ ABC Low cost</td>
<td>+ FPE/ABC Losing market share</td>
<td>+ FREL/ABC More changes</td>
<td>+ FREL/ABC More changes</td>
<td>+ PMG/MFG Lower margins</td>
<td>+ PMG/MFG Lower margins</td>
</tr>
<tr>
<td>Core</td>
<td>- No XDP product</td>
<td>+ WFP High reputation</td>
<td>+ ABC Low cost</td>
<td>- Not full system</td>
<td>- Price</td>
<td>- Pay to pay</td>
<td>- Higher margins</td>
<td>- Higher margins</td>
</tr>
<tr>
<td><strong>Cautions about Competitors</strong></td>
<td>+ ABC Not notable</td>
<td>+ WFP High reputation</td>
<td>+ ABC Low cost</td>
<td>+ FPE/ABC Losing market share</td>
<td>+ FREL/ABC More changes</td>
<td>+ FREL/ABC More changes</td>
<td>+ PMG/MFG Lower margins</td>
<td>+ PMG/MFG Lower margins</td>
</tr>
<tr>
<td><strong>Cautions about Competitors</strong></td>
<td>+ ABC Not notable</td>
<td>+ WFP High reputation</td>
<td>+ ABC Low cost</td>
<td>+ FPE/ABC Losing market share</td>
<td>+ FREL/ABC More changes</td>
<td>+ FREL/ABC More changes</td>
<td>+ PMG/MFG Lower margins</td>
<td>+ PMG/MFG Lower margins</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Our Company</th>
<th>external</th>
<th>competitor</th>
<th>Our Core Processes</th>
<th>external</th>
<th>competitor</th>
<th>Our Core Processes</th>
<th>external</th>
<th>competitor</th>
<th>Our Core Processes</th>
<th>external</th>
<th>competitor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strength</td>
<td>Systemic</td>
<td>Strategy</td>
<td>Strength</td>
<td>Systemic</td>
<td>Strategy</td>
<td>Strength</td>
<td>Systemic</td>
<td>Strategy</td>
<td>Strength</td>
<td>Systemic</td>
<td>Strategy</td>
</tr>
<tr>
<td>Quality</td>
<td>Delivery</td>
<td>Commitment</td>
<td>Quality</td>
<td>Delivery</td>
<td>Commitment</td>
<td>Quality</td>
<td>Delivery</td>
<td>Commitment</td>
<td>Quality</td>
<td>Delivery</td>
<td>Commitment</td>
</tr>
<tr>
<td>Price</td>
<td>Competition</td>
<td>Price</td>
<td>Price</td>
<td>Competition</td>
<td>Price</td>
<td>Price</td>
<td>Competition</td>
<td>Price</td>
<td>Price</td>
<td>Competition</td>
<td>Price</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Long-term Profit</th>
<th>44%</th>
<th>38%</th>
<th>40%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rev</td>
<td>$120M</td>
<td>$67M</td>
<td>$5M</td>
</tr>
<tr>
<td>Variable Margin</td>
<td>42%</td>
<td>44%</td>
<td>56%</td>
</tr>
</tbody>
</table>
5g. Business Environment Analysis Summary

**Internal Promoting**
- strong staff
- firm commitment
- helpful partners

**Internal Restraining**
- billable hours
- diverse agendas

**External Promoting**
- limited competition
- market interest
- referring clients
- client loyalty

**External Restraining**
- employment rate
- e business buzz
- dispersion of client location
Strategic Planning – 10 Questions

5g. Business Environment Analysis Summary

As you write your Objectives, Strategies and Actions, use this chart as a reference.

Each initiative must be able to survive in the business environment listed above

- taking full advantage of the promoting forces, and
- minimizing the effects of the restraining forces.
Strategic Planning – 10 Questions

6. Objectives: "what to do next"; specific milestones of what must be accomplished in the next year to support the Vision. Usually three to five are useful.

7. Strategies: "how to" accomplish Objectives while considering business environment requirements. Usually three to five per Objective are useful.

8. Action Plans: "to do assignments"; quarterly, prioritized action steps necessary to support the Objectives and Strategies. Usually three to five per Strategy are useful.
Strategic Planning – 10 Questions

**Initiative Format**  Somewhere within the following three levels of initiatives you will want to clarify WHO will do WHAT by WHEN with SUCCESS AS MEASURED BY needing WHAT RESOURCES

One way to do this: Use **S**MARTR criteria to write useful Objectives Strategies. And/or Actions:

**S – Specific:** Are we clear about what is to be done? Clearly states the expected outcome or result for which an employee will be held accountable. The outcome is linked to overall business objectives.

**M – Measurable:** How will we know if it has been achieved? States the criteria that will be used to measure performance and make sure that the objective has been accomplished.

**A – Accountable:** Do we have the capabilities to be successful? Falls within an employee’s primary area of responsibilities. Or Aligned, is this initiative aligned with the organization’s other goals.

**R – Realistic:** Reasonable chance of achievement.

**T – Time bound:** When does it have to be completed? States the specific time frame in which it is to be accomplished.

**R – Resources needed**
Strategic Planning – 10 Questions

Objectives (1) , Strategies (1a) , Actions (1a1):

1. Build a network which generates 60% billings by January, 20XX

1a. Identify and establish a contact program for two referral sources.

1a1. AB Attend Joint seminars; one per quarter; $4000
1a2. CD Collate Mailing list contacts; update monthly. $200
1a3. EF Attend referral source sponsored programs; one per quarter. $3500

1b. Identify 5-10 clients or potential clients for the contact program.

1b1. GH Establish and calendar a plan for quarterly contact.(Lunches, breakfasts, entertainment). $0
1b2. IJ Complete an off-the-clock visit to client location; $2000
Strategic Planning – 10 Questions

# Strategic Planning – 10 Questions

## 9. Plan Implementation Considerations:

- Prohibition plans, announcements plan, budget plan, barriers.

<table>
<thead>
<tr>
<th>Title</th>
<th>Time</th>
<th>Author</th>
<th>Respons.</th>
<th>Detail</th>
<th>Monitor Who / Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Corporate Mission - Holland Group</td>
<td>none</td>
<td>A</td>
<td>A, B, C</td>
<td></td>
<td>A &quot;Blue Sky&quot; check annually</td>
</tr>
<tr>
<td>2. Corporate Values</td>
<td>none</td>
<td>A</td>
<td>A, B, C</td>
<td></td>
<td>A &quot;Blue Sky&quot; check annually</td>
</tr>
<tr>
<td>3. Corporate Vision</td>
<td>( ) years</td>
<td>A</td>
<td>A, B, C</td>
<td>As measured by where we want to go</td>
<td>A &quot;Blue Sky&quot; check annually</td>
</tr>
<tr>
<td>5. Review &amp; Confirm Corporate Objectives</td>
<td>yes</td>
<td>A</td>
<td>A &amp; B</td>
<td>Measureable steps toward mission</td>
<td>A challenge annually Rev. semi-annually</td>
</tr>
<tr>
<td>7. Establish Corporate Strategic Actions</td>
<td>2-5 years</td>
<td>A</td>
<td>A &amp; B</td>
<td>5-10 most important assignments, breakthroughs Must do's</td>
<td>A semi-annually</td>
</tr>
<tr>
<td>8. Division Objectives</td>
<td>1 year</td>
<td>B &amp; C</td>
<td>B &amp; C</td>
<td>Serve corporate strategic actions and division initiatives Measureable goals</td>
<td>B &amp; C TBD A semi-annually</td>
</tr>
</tbody>
</table>
Strategic Planning – 10 Questions

10. Plan Monitoring Considerations: criteria and plan to monitor your progress
Presentation Outline

1. Overview
2. Attendees
3. Prework
   3a. interviews
   3b. key decision charts
4. What to do
   4a. Room set up and materials
   4.b Ten Questions

5. How

6. Q/A
Strategic Planning
Implementation Options

Four Types of Planning Organizations

The **first type** does not plan.

A **second type** of planning organization goes through the motions of planning, the offsite, the retreat, the three-ring-binders, etc and actually do the work of creating and documenting the plan.

But they do not use the plan operationally when they return to their workplace. They too will claim to be too busy.
A **third type** of planning organization goes through the motions of planning, the offsite, the retreat, the three-ring-binders, etc and actually do the work of creating and documenting the plan. But they believe the plan is more or less secret.

They do not share the content of the plan with the organization at large. These leaders believe their employees could not handle either the confidentiality or the complexity of the plan. They protect their employees accordingly.
A **fourth and preferred type** of planning organization goes through the motions of planning, the offsite, the retreat, the three-ring-binders, etc and actually do the work of creating and documenting the plan.

They also engage their employees in the preparation for, the development of, and the sharing of the parts of the plan a particular group of employees need to know in order for them to contribute to the organization.

Adults working with adults in an adult manner. This applies to both strategic planning and scenario planning.
Next Steps:

1. Select a business goal that needs attention.

2. Identify the behaviors, decisions, and ideas that you would prefer to see.

3. What thinking approach and style would produce the preferred ideas, behaviors and decisions that would deliver the business goal you seek?

4. Then find a resource to help you learn to think that way.
Presentation Outline

1. Overview
2. Attendees
3. Prework
   3a. interviews
   3b. key decision charts
4. What to do
   4a. Room set up and materials
   4.b Ten Questions
5. How
6. Q/A
Plan for your successful implementation of this new thinking.

“Leadership is not about what you know…

It’s about what you do with what you know.”

James Belasco
Resources

Web: www.johncanfield.com
Web: www.goodthinkingseries.com
Videos: www.YouTube.com/canfieldgoodthinking
Books: www.amazon.com