



COMPANY:	DATE:	Y	N	D/K
Listen and Learn (Data-Gathering)				
1. We have <u>analyzed</u> our Customers by revenue and profit. We know our Ideal Client.				
2. We have <u>analyzed</u> our Competitors 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</u> our Customers 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.				
Plan Development (Putting the Plan Together)				
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.				
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/divest).				
16. We have identified our <u>top Strategic Priorities</u> with champions and goals.				
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> .				
Implementation and Strategic Management (Communication, Assessment and Follow-up)				
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 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).				



	BASE	+1	+2	+3	+4	+5
Sales (\$M) What revenue goals do you have?						
Profit (Gross or Net Margin (%)) What profitability goals do you have?						
ROA (net profit/total assets) What business ratios are critical to you?						
Productivity (Net Sales/Employees) How does productivity need to change?						
What other goals are important to you?						
Culture						
Succession Plan / Leadership Transitions						
Operational						
Personal						



TEAM:

NAME:

1. How are we operating by our Company's Core Value?
-how well are we living these (1 (seldom) - 4 (all the time))
2. What are the key **Goals** for this Team (or Department) over the next 3 year?

3. What is working well with this team (Department)? What are the team's primary **Strengths** and makes this team stand-out?

4. What is not working well with the team (Department)? What are the team's primary **Weaknesses** and are holding the team back?

5. What are ways the team can improve? What are key **Opportunities** you have seen other Team/Departments do that this team should consider pursuing.

6. What are blind spots or **Threats** for this team. This might get in the way of the team being successful for the long-term.

7. What are Critical Results aka **Key Performance Indicators** for this team/Department? What do you expect this team/department to deliver and how do you measure success?

8. What is the most important focus area for this team next year?

9. Please add any other comments to help this team/department improve.



NAME OF COMPETITOR >>>		
Person responsible for Research		
Ownership / Size (revenue and Employees) <i>(who owns and how many employees and/or revenue)</i>		
Locations <i>(local, regional, national)</i>		
Target Market/Customer <i>(scope of markets served)</i>		
Website		
Marketplace Position <i>(What are they known for? What is their tag line?)</i>		
% Market Share <i>(high, medium, low)</i>		
Products/Services <i>(scope of products/services)</i>		
Pricing <i>(higher than us, same, lower)</i>		
Other Revenue Sources <i>(other ways they are bringing in revenue)</i>		
Purpose, Values, Mission Statement <i>(What do they have on website?)</i>		
Growth Rate <i>(increasing, stable, decreasing)</i>		
Significant recent events <i>(lost/gained big customer, leadership transitions, new)</i>		
Marketing/Advertising <i>(How do they develop leads and build their brand – social media, key channels)</i>		
Key Strengths <i>(Competitive Advantages)</i>		
Key Weaknesses <i>(Competitive Disadvantages)</i>		
Strategies <i>(aggressive, lost passion, can't tell)</i>		
Threat Level <i>(high, medium, low)</i>		
What should we do? (Be aggressive, protect, target)		



Confidential Draft

Purpose & Core Values Our "why" and "how"	Vision "Where" we want to be	3-Year Key Assumptions Our plan is designed to live in "this" reality
Purpose: Core Values:	Vision: 5-Year Vision Themes:	Top External and Internal:
3-Year Strategic Goals Key measures of success	3-Year Strategic Goals What does success look like?	3-Year Strategic Choices Where will we win?
Date: Revenue Profit: Other Key Goals:	<ul style="list-style-type: none"> • Vision Theme #1 -Outcome -Outcome -Outcome • Vision Theme #2 -Outcome -Outcome -Outcome • Vision Theme #3 -Outcome -Outcome -Outcome • Vision Theme #4 -Outcome -Outcome 	Investment Strategy <ul style="list-style-type: none"> • Build: • Hold: • Divest: Key Market/Customer – how are these changing? Ideal Customers – how do you define? Products/Services – how are these changing?

Key Performance Indicators / Goals						
PERCEPTIVE	Owner	Baseline	2023	2024	2025	2026
Revenue						
Direct Labor						
EBITDA						
Utilization						
Attrition Rate						
Staffing						

2023 SWOT Analysis	
INTERNAL STRENGTHS – ADVANTAGES:	EXTERNAL OPPORTUNITIES – GROW / IMPROVE:
1.	1.
WEAKNESSES – CHALLENGES:	THREATS – BLIND SPOTS:
1.	1.

2023 – 2024 Strategic Priorities <small>Key Priorities to Reach Our Vision</small>		
	Strategic Priority	1-Year Strategic Outcomes <small>(How Will We Define Success by 2023)</small>
1		
2		
3		





High Performing Teams Calendar

Team	Primary Objective	Leader	Team (Key Roles)	Frequency	Time/Day	Location	Reports Provided
Executive Team	Review KPIs – key performance indicators Operational Issues Strategic Issues Resource Allocation	President/CEO	Key Executives	Weekly	1 hour	TBD	KPIs
Operational – Run the Business Review	Manage KPIs Cross department communication – Department updates State of the business Operational Issues Strategic update	COO / VP Operations	Run the Business Team (Key Department heads)	Weekly monthly	1 hour 2-3 hours	TBD	Run the Business Scorecard Follow-ups / Corrective Actions
Strategic - Change the Business Review	External “Look up” Internal changes Assess strategic directions Address strategic issues	Strategic Process Owner	Strategic team	Monthly Quarterly	2-4 hour 4-8 hours	Conf room	Priority reviews Strategy scorecard Updated action plans Rocks
Priority reviews	Keep Activities on track Manage challenges/barriers	Strategic Priority Champions	Strategic Priority teams	At least monthly	4-6 hours a month	TBD	Strategic Priority Plans Action Plans
Board of Advisors	External “Look up” Internal changes Assess strategic directions Discuss strategic issues Open Forum	President / CEO	3-5 Outside Advisors	Quarterly	4-6 hours a quarterly	TBD	Board book / info 1 week prior to meeting

