

# STRATEGIC PLANNING GUIDE

## BIZPLAN

***BIZCOACH, INC.***  
**STRATEGIC PLANNING**  
**EXECUTIVE COACHING**  
**LEADERSHIP DEVELOPMENT**

Edward "Sandy" Cutler, Ph.D.  
415 Lochmoor Place  
Eugene, OR 97405  
541.954.1387

[bizcoachinc@comcast.net](mailto:bizcoachinc@comcast.net)  
[www.bizcoachinc.com](http://www.bizcoachinc.com)

# VALUES, MISSION, VISION

To develop an effective strategic plan it's important to clearly understand the purpose of the organization; to determine the core values of the organization; to create a compelling vision for the organization; and, to establish the mission that will enable you to achieve your vision. Values are the foundation upon which the organization is built. Vision is like a compass that helps guide everyone to an important future destination. The mission is a clear and compelling overall goal statement that directs your actions and enables you to achieve your vision.

## VALUES DISCUSSION

1. From the attached list of values, pick three organization values. Write the three organizational values below and give a brief definition of what the value means to you.

Organizational Value \_\_\_\_\_:

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Organizational Value \_\_\_\_\_:

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Organizational Value \_\_\_\_\_:

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## **VALUES**

Our core values:

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## VISION QUESTIONS

1. What business are we in?

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2. What is the purpose of our organizational existence?

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3. What makes us unique or distinctive?

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4. Who are our customers?

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5. What contributions does our company make to society?

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6. What are we especially good at?

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7. How do we differentiate ourselves from our competition?

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8. What kind of organization do we want to be in the future?

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9. If everything could be perfect, what would our company look like in five years?

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## MISSION

1. Who is our primary customer now? Who will be our primary customer in three years?

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2. Who are our primary competitors now? Who will be our primary competitors in three years?

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3. What is the value of what we make, sell, or deliver to our customer?

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4. What specific target do we need to focus on to achieve success?

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# EXTERNAL SCAN

**The external scan is a process to identify opportunities and threats that may positively or adversely affect the company. During the external scan important information is gathered, reviewed, and analyzed concerning the future of the business.**

List and briefly describe the most important changes that you believe may affect the business in the next three years:

- 1. What changes do we expect in our industry in the next three years?

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- 2. What changes may affect our customer base in the next three years?

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- 3. What changes do we anticipate with our competitors in the next three years?

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4. What changes in technology may affect our industry or our company in the next three years?

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5. What changes in the social, regulatory, or political environment may affect our industry or our company in the next three years?

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6. What changes in our suppliers may affect our industry or our company in the next three years?

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# EXTERNAL SCAN PRIORITIES

List the top five opportunities and/or threats facing us today.

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4. \_\_\_\_\_  
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5. \_\_\_\_\_  
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## INTERNAL SCAN

**The internal scan is a process to identify the strengths and weaknesses of the business. During the internal scan important information is gathered, reviewed, and analyzed concerning the current health of the business. The internal scan is similar to a "check-up" physical.**

Using the following worksheets, conduct an internal scan in the following areas:

1. PEOPLE
2. PRODUCTS & SERVICES
3. SYSTEMS & STRUCTURES
4. FINANCIAL RESOURCES
5. INNOVATION

When we have finished with each of the internal scan worksheets, we will use the summary sheet to prioritize strengths and weaknesses of the company.

## PEOPLE

1. How knowledgeable and skilled is our workforce (compared to the best in the industry)?

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2. How motivated and dedicated are our employees (consider factors like: absenteeism, attitudes about work, willingness to go the extra mile, team orientation)?

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3. Are our employees customer oriented? Give examples.

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4. Do our employees have the ability to learn new skills?

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5. Do we have strong and effective leadership and management?

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## PRODUCTS & SERVICES

1. Is our company customer driven?

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2. Do we have the right products/services to compete successfully for the next three years?

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3. Are our products/services priced right?

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4. How good is our customer service?

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5. What new products will we need to compete successfully in the next three years?

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## SYSTEMS & STRUCTURES

1. Do we have a written business plan?

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2. Do we have an effective marketing plan?

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3. Do we have effective internal and external communication systems?

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4. Do we have an effective system of financial controls in place?

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5. Are our buildings and offices adequate?

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6. Is our equipment adequate and up to date?

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7. Do we have adequate insurance (employee, liability, risk, etc.)?

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8. Do we have good external advisors (legal, accountant, etc.)?

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9. Is our pay and compensation structure adequate and competitive?

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## FINANCIAL RESOURCES

1. Is our company profitable?

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2. Do we generate monthly or quarterly profit and loss statements?

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3. Do we have an adequate line of credit?

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4. Do we have a good working relationship with our banker?

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5. Do we have the capital to grow the company?

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## INNOVATION

1. Is our company innovative? List some innovations developed in the last two years?

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2. Do we encourage risk-taking in the company?

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3. How creative and innovative are our employees?

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4. Do we have a regular system or plan in place to encourage and/or reward innovation?

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# STRENGTHS AND WEAKNESSES

List the top five strengths/weaknesses of our company.

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## STRATEGIC GOALS

**Strategic goals are the long-range (1-3 years) strategies necessary to make fundamental improvements to your company. Strategic goals should be meaningful and measurable. Well-developed strategic goals are “SMART.”**

**SPECIFIC  
MEASURABLE  
ACTION DRIVEN  
REALISTIC  
TIME DRIVEN**

How to set strategic goals:

1. Review the vision, values, mission
2. Review the list of external opportunities and threats
3. Review the list of internal strengths and weaknesses
4. Prioritize the most important opportunities, threats, strengths, weaknesses
5. Develop a strategic goal for each priority listed

STRATEGIC GOALS:

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2. \_\_\_\_\_  
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# TACTICS

**Tactics are the specific actions that are needed to achieve the strategic goals. Tactics represent a "blueprint" or "work plan" for achieving the strategic goals.**

Using the STRATEGIC GOAL WORKSHEET, for each strategic goal, specify:

1. Tactics (How?) - Tactics specify how to achieve the goal. Tactics include specific actions, personnel, equipment, facilities, new technologies, etc.
2. Time lines (When?) - Specify when each phase of a tactic, objective, or activity will be completed.
3. Responsibility (Who?) - Identify the person(s) responsible for completing each tactic, objective, or activity. Whenever possible, identify the teams of people that will accomplish the tactic.
4. Cost (How much?) - Specify how much you think it will cost to accomplish each aspect of each tactic.
5. Assessment (Mission accomplished?) - Determine how to assess whether each tactic has been accomplished. What will be the evaluation criteria for each tactic? Be as specific as possible.

## MONITOR & EVALUATE

**During the monitor and evaluate phase of the strategic plan, checkpoints and benchmarks are established to determine the progress in reaching each goal.**

Check points include:

- Where are we now?
- Are we on course?
- How do we correct our course?
- Should we continue the mission?
- Have we accomplished our goals?

1. Is there a system in place to get the information that is needed to track progress of a strategic goal?

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2. What are the critical checkpoints and benchmarks we will use to evaluate our progress?

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3. When do we plan to review our plan and progress?

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4. Have we identified potential risks to our plan (market changes, financial changes, etc.)?

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5. Do we have a contingency plan in the event something goes wrong with our plan?

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