

Business Management Review

Preparing for Strategic Planning



Objectives

- ✔ Create a sense of leadership awareness. This being done by us, not to us.
- ✔ Develop a shared strategic objective for the organization to which everyone buys in.
- ✔ Improve core skills among the leadership team which include communication, conflict resolution, and the ability to make sustainable decisions.
- ✔ Prepare the leadership team to create a strategic plan that allows you to realize the shared objectives as opposed to a strategic plan that sits unused on a shelf.



Overview

/// **Mission: The Present**

What we do and why we exist

/// **Values: The Distinction**

What we believe in and what sets us apart

/// **Vision: The Future**

Where we are going and desired long-term results



Our Mission

What we do and why we exist

A mission statement is a single statement vital to the success of the company as a whole.

It is important to have this foundation to guide decision making. *If it doesn't contribute to the mission, it shouldn't happen.*

The best mission statements leave a lasting impression of your brand in the minds of your customers and your employees, encouraging them to choose you over other options.

Our Values

What we believe in and what sets us apart

A bulleted list of 3-5 positive and results-focused attitudes.

What do we stand for?

How do we work together?

What values are honored in every decision?

How are we different from our competitors?

This should really be you, not some generic fluff that could apply to any organization.

Our Vision

Where we are going and desired long-term results

A list of 6 to 8 items that describe what the organization is becoming.

If no obstacles got in the way, where would we be in 5, 10, or 20 years?

What do we dream about?

***Broad objectives for the future of the organization.
We get into the nitty gritty of specific goals later in this exercise.***

Critical Success Factors

What must be done to assure success?

What is so important that if we do not accomplish it, the organization will fail?

Consider breaking these down into categories.

Potential Critical Success Factor Categories

- /// Sales & Marketing
- /// Customer Service
- /// People Development
- /// Quality
- /// Technology & Automation
- /// Health & Safety
- /// Legal & Government
- /// Operations
- /// Financial Controls
- /// Communication

Consider other factors unique to your Mission and Vision.

Critical Success Factors

What must be done to assure success?

// Factor 1:

What absolutely must occur that is fundamental to avoiding disaster?

// Factor 2:

If these things don't happen, we will fail to accomplish our Vision.

// Factor 3:

// Factor 4:

This may be the single most challenging aspect of this exercise.

// Factor 5:

// Factor 6:

// Factor 7:

// Factor 8:

Business Goals

How will we get where we need to go?

✓ Goal 1:

What must be accomplished over the next 6 months/12 months/2 years?

✓ Goal 2:

What directives have we been given?

✓ Goal 3:

What milestones would tell us that the organization is on track?

✓ Goal 4:

How will we define success?

✓ Goal 5:

There may be a few, or even several, goals for each Critical Success Factor (CSF). All goals listed here must connect to at least one CSF.

✓ Goal 6:

✓ Goal 7:

✓ Goal 8:

The Test

- ✓ Do all of your statements support the Mission of the organization? Yes No
- ✓ Does each Business Goal connect directly to a Critical Success Factor (CSF)? Yes No
- ✓ Is every CSF connected to at least one Business Goal? Yes No
- ✓ Is the Vision attainable given the CSFs and Business Goals? Yes No
- ✓ Are your Values honored in every goal or statement? Yes No
- ✓ Are there Values suggested by the rest of the document but not explicitly stated? Yes No

Are you ready to get on with it?

Contact STM Today



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