

DO IT YOURSELF STRATEGIC PLANNING KIT

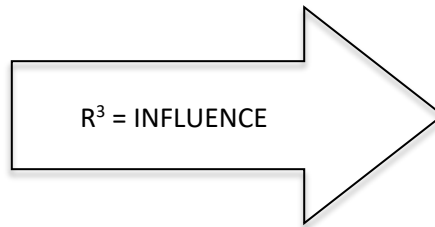
1. Schedule some time to work with the team, Key Leaders and Managers;
 - a. Away from the office is better
 - b. Using a skilled facilitator is better
 - c. Following a meaningful, results driven process is better
 - d. Get them to read *The Advantage*, Lencioni, before you go
2. Have key Leaders work on the SWOT individually, ask them for three results in their area that are positive in the last year, and three areas where their department needs to improve and grow this year.
3. Owners plus key advisors, work through the personnel inventory work sheets. Keep results confidential. Start getting your head around potential human capacity and future hiring issues.
4. Agenda for ½ day or full day session
 - a. Build the team, do something fun, engaging
 - b. Facilitate a discussion on their SWOT results
 - c. Let them each report on the 3 and 3, have some discussion and feedback
 - d. Owner: Tell the stories:
 - o First: history and key progress the last year.
 - o Second: where are we going, big picture, 3-5 years out.
 - e. Start creating next year's vision with conversations about Big Picture Goals, Strategic Priorities. Brainstorm this with the team. Input precedes buy in.
 - f. Break the team down into functional groups and have them work on their vision and top 3-5 major strategic goals.
 - g. Regroup, review outputs from each organization
 - h. Take the time to select and articulate top priorities, thematic goals. Align human and financial resources to match these priorities
5. Celebrate with a nice dinner, or other interactive activity
6. Take time in the following 30 days, to wrap this work into a clear written plan. Finish the Who Does What assignments. Review as a team, plan communication to the rest of the business.
7. Lastly have 1-1 sessions with each leader, set goals for 1st quarter. Coach, inspire, focus your leaders.

SWOT Analysis

Strengths	Weaknesses
Opportunities	Threats

Leadership Review

- RESPECT/TRUST:
- RESULTS:
- RELATIONSHIPS:



WHO Does WHAT

The most critical decision a business owner makes is **WHO** does **WHAT**.

90% of all people issues can be alleviated with some basic process in place. Expectations in writing, job descriptions and score cards, quarterly performance reviews, etc.

A functional organization chart can help you determine what work needs to be done by you and what could be done by someone else. (See Attachment)

A people organization chart will provide the reporting and management structure you want in your organization.

Current Organization Structure

Future Organization Structure

Key Ideas:

1. What key employees are at risk of leaving?
2. Who is ready for a bigger role?
3. What positions do you need to add first? Why?
4. Start building a virtual bench.

CRITICAL PERSONNEL INVENTORY

Once you fill in this chart, keep it extremely confidential

The Assessment Table on the next page has six columns.

Column 1: Name

Column 2: Current Performance, in their current role, rate the performance of this employee by the following scale.

- A = Consistently Exceeds Expectations
- B = Above Average
- C = Average
- D = Below Average
- F = Rarely Meets Minimum Expectations

Column 3: Future Potential. This is a very different question. If the company continues to grow, what is this employee's potential to lead and deliver results in a larger, more complex leadership role?

- A = Has the potential to be a General Manager or Future President
- B = Displays Great Leadership Potential
- C = Could Manage a Small Team
- D = Limited Capacity or Desire to Lead Others
- F = No Leadership Capacity

Column 4: If this employee won the lottery and turned in their 2-week notice how would you feel?

- Enter a minus sign (-) if it would wreck your plans for the future
- Enter a neutral (n) if you are not sure
- Enter a (+) if it would solve a problem for you if they left

Column 5: The Ultimate Question. If you knew what you know today about this employee on the day you hired them, would you still make them an offer? If the answer to this question is 'NO' you have some tough leading to do.

Column 6: What should you do with this employee next year? Train and Develop high potential people. Help 'C's' get better. Move the wrong people on to other opportunities outside your company. The rest of your team needs you to do this.

Getting Straight A's with Your Team

Assessment: Current Team performance

Scorecard for People #1: Assessment

Name	Current Performance (Rate A-F)	Future Potential (Rate A-F)	Lottery Win (Joy/Sorrow)	Ultimate ? (Yes/No)	Comments

Creating Alignment for the Whole Team

Name	Personality	Strengths	Roles	Responsibilities	Scorecard

Accountability: All of the documentation in the world will not make an effective team. The leaders and managers must have a process for accountability, another Rhythm and Routine. Monthly or quarterly looks at the numbers are fine for some positions, for others it might be daily or weekly. For each key leader you must schedule a more formal quarterly progress and planning session to evaluate and coach their performance. **PUT IT IN WRITING!! COLLABORATIVELY CREATE IT!! WHAT GETS MEASURED GETS DONE!!**

What accountability processes need to be in place?

When will you begin this key performance accelerating exercise

Acceleration: (Training) Continuous Improvement must be happening at two levels in your business; Operational and Leadership.

If you have a documented operations manual that details how a job is to be performed, you have to train your people on how you want the job done. Unfortunately, most organizations do a very poor job of this leaving the employee to interpret what you want. You may get the results you want, or you may not.

Most organizations want help finding great leaders to hire. The bottom line is they need to be developed. And they will only follow leaders who are stronger than they are.

What is your training strategy for your people?

How will you develop yourself and your key leaders to lead at a higher level?

The DNA of a Business

1. **Purpose:** Answers the question, Why am I here? Why do we exist? Purpose focuses and sets boundaries for the team.

An effective Purpose Statement should:

- Be simple, concise, compelling, memorable
- Be one well-crafted sentence
- Fit on the back of a business card

Purpose Draft ideas:

2. **Values:** Core convictions regarding truth that determine behaviors

We **say** what we believe, but we **do** what we value.

Values lived out over time create the culture of your company.

Long term fit on a team more about shared values, than shared vision.

Values Brainstorming

1

2

3

4

5

III. Vision:

*“Good business leaders **CREATE** a vision, **ARTICULATE** the vision, passionately **OWN** the vision, and relentlessly **DRIVE** it to completion.”*

- Jack Welch

- Collaboratively created, listen to all players, input precedes buy-in
- You must dream big to inspire, but do not create delusional fantasies
- Weave in strategic measurable goals with intangible cultural story telling
- Hands and feet follow the heart, appeal to the heart first
- Do not make it all about money

Tangible, Measurable Goals	Intangibles, look, feel, attitude, etc.
Tell the Story:	

Marketing Vision:

Key Marketing Goals

- 1.

- 2.

- 3.

Measuring for success

- 1.

- 2.

- 3.

Sales Vision:

Key Sales Goals

- 1.
- 2.
- 3.

Measuring for success

- 1.
- 2.
- 3.

Operations Vision:

Key Operations Goals

- 1.

- 2.

- 3.

Measuring for success

- 1.

- 2.

- 3.

Vision for the Team:

Key People Goals

- 1.
- 2.
- 3.

Measuring for success

- 1.
- 2.
- 3.

Financial Vision:

Key Financial Goals

- 1.
- 2.
- 3.

Measuring for success

- 1.
- 2.
- 3.

Systems/Process Vision:

Key Systems/Process Goals

- 1.
- 2.
- 3.

Measuring for success

- 1.
- 2.
- 3.