

Strategic Planning

Forget Everything You Know About Strategic Planning!

Strategic planning doesn't have to be boring, repetitive and filled with days of discussion about "our mission statement" or the dreaded "SWOT Analysis."

Our evolutionary approach to strategic planning and business development combines our years of experience and ideas on competition, ideology and market realities with the most progressive research and thinking in the field, including the works of Jim Collins (*Good to Great*) and W. Chan Kim and Renee Mauborgne (*Blue Ocean Strategy*).

Our Small and Mid-size Business approach is structured to be:

- ▶ **Engaging.** We get involved in the conversation and provide our opinion.
- ▶ **To the point.** We don't waste time on activities that don't matter.
- ▶ **Outcome oriented.** We are focused on identifying what you want to achieve rather than the tactics.
- ▶ **Flexible.** We can do it all at once or over a time period.
- ▶ **Challenging.** We make you think.

| | Short Term Planning | Long Term Planning |
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| Time Frame | ▶ 1 Year or Less | ▶ 3 to 10 Years |
| Emphasis | ▶ What needs to get done | ▶ Where do we want to be and what does that look like |
| Approach | ▶ Assessment driven-it's not vision; it's action ▶ Understanding immediate past, present & future | ▶ Idea driven yet analytical in its methodology ▶ Considers external and internal conditions and realities |
| Deliverable | ▶ One page plan that identifies Who, What & When | ▶ 5 to 7 page document that provides a flexible framework for the company's direction |
| Participants | ▶ Leadership team | ▶ Leadership, management & key employees/ advisors |
| Commitment | ▶ 2 to 4 hours and quarterly check ups | ▶ 1.5 to 2 days (off-site) and quarterly check ups |

The result of our strategic planning process is a clear and concise document that communicates a small and mid-size business' ideology, direction, desired outcomes and how to achieve and measure those outcomes.