



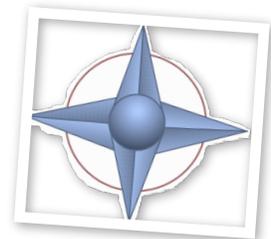
Strategic Planning Workbook

Clarify your Strategic Thinking

The Situation...

Start here. . .

A good strategic planning process starts with a clear picture of the current situation - that includes your current challenges and problems. A clear view of the competition and markets. The quickest way to do that is to take a FAST SCAN of your business and make sure you have a complete, 360° view of the situation.



FAST SCAN

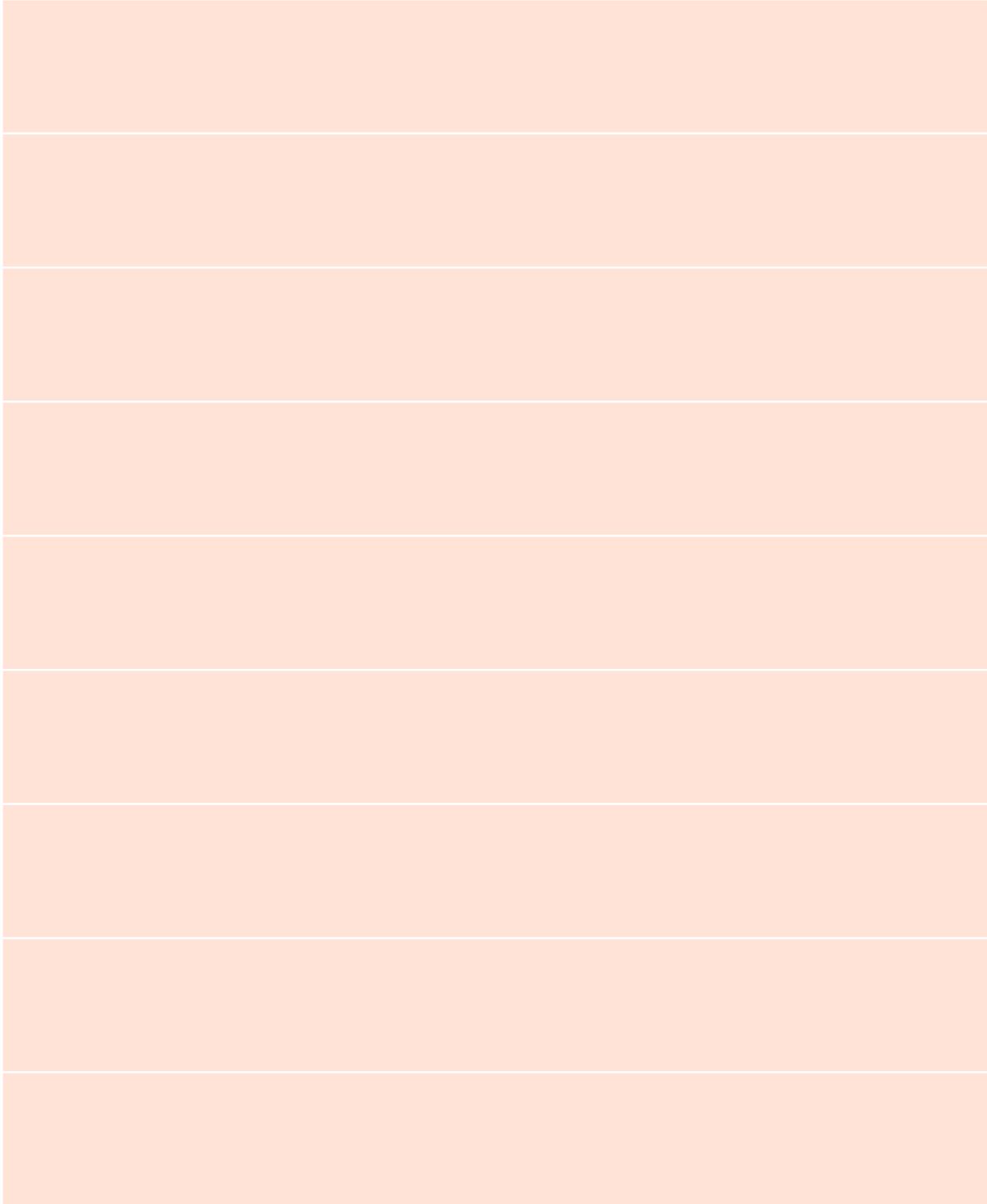
FAST SCAN is an acronym for Frustrations, Adversaries, Segments, Trends -- Sums, Competencies, Assumptions and N-Joy (you and your teams passions).

As you work through each of the sections you gain a clear picture of the opportunities and challenges before you. You gain clarity on what is working -- and what is not.

And you form the foundation for the section to come when it is time to create a vision for your organization or team. So, turn the page and let's get started with a 30,000 foot view of your situation.

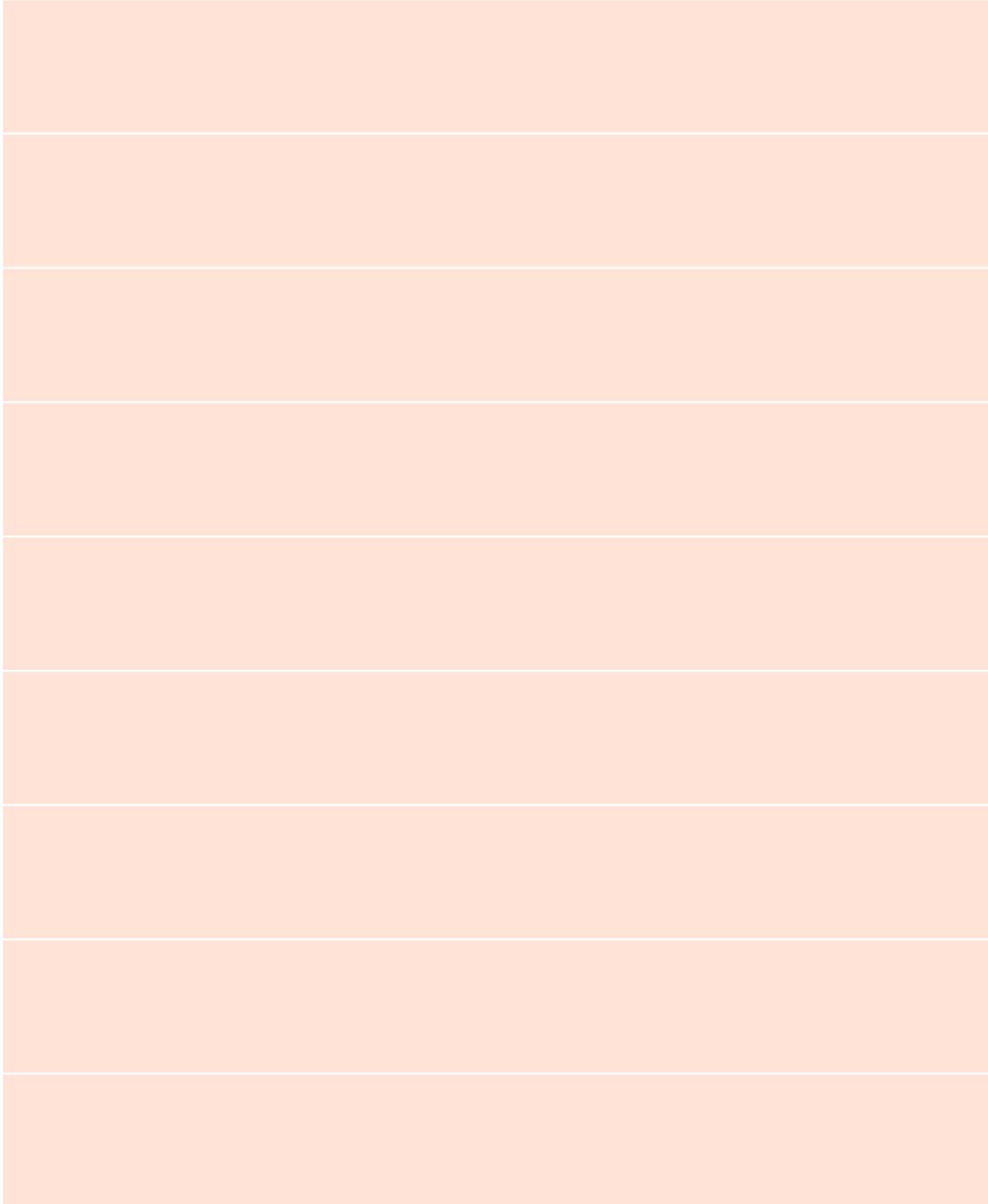
Frustrations...

In the space below, note all of the issues, concerns, challenges, fears and threats that you and your team are currently concerned about - or concerned about in the future.



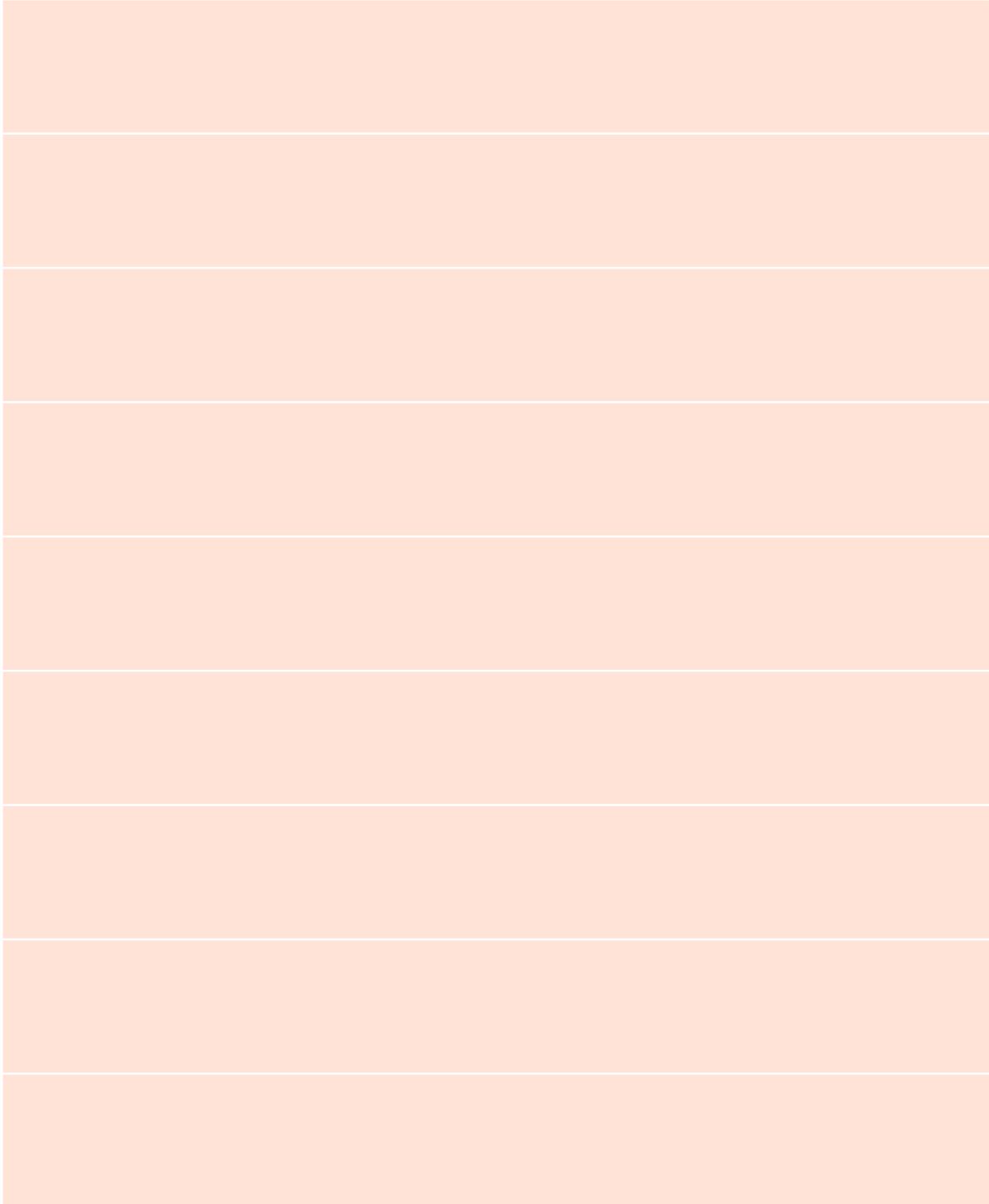
Adversaries...

Who are your toughest competitors? Why are they gaining market share? What strengths do they have you do not? How are they positioned? What weaknesses do they have?



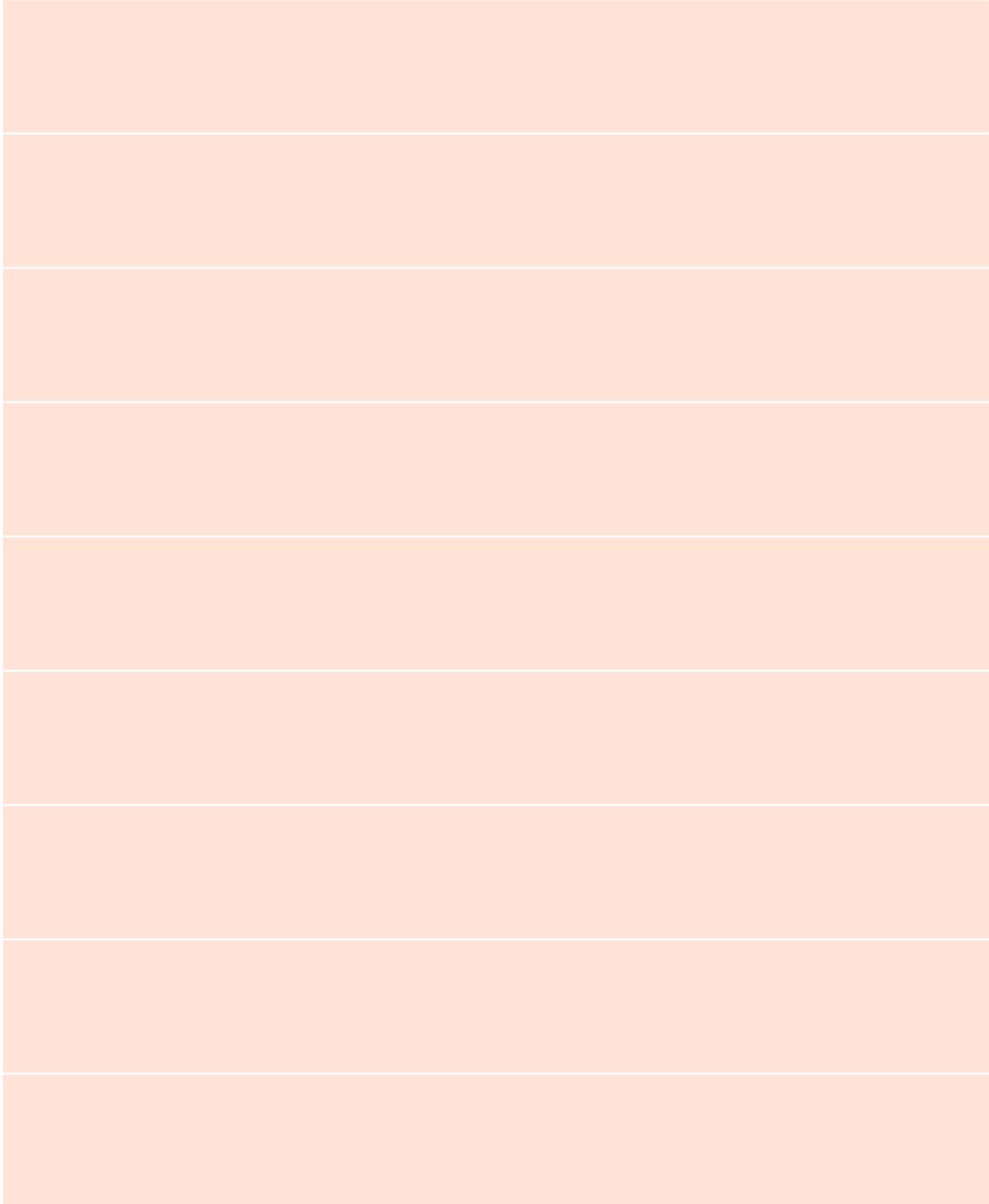
Segments...

What are your most profitable, unprofitable segments? Which are growing, shrinking? Which are most important to your future? How are segments being fragmented by competition?



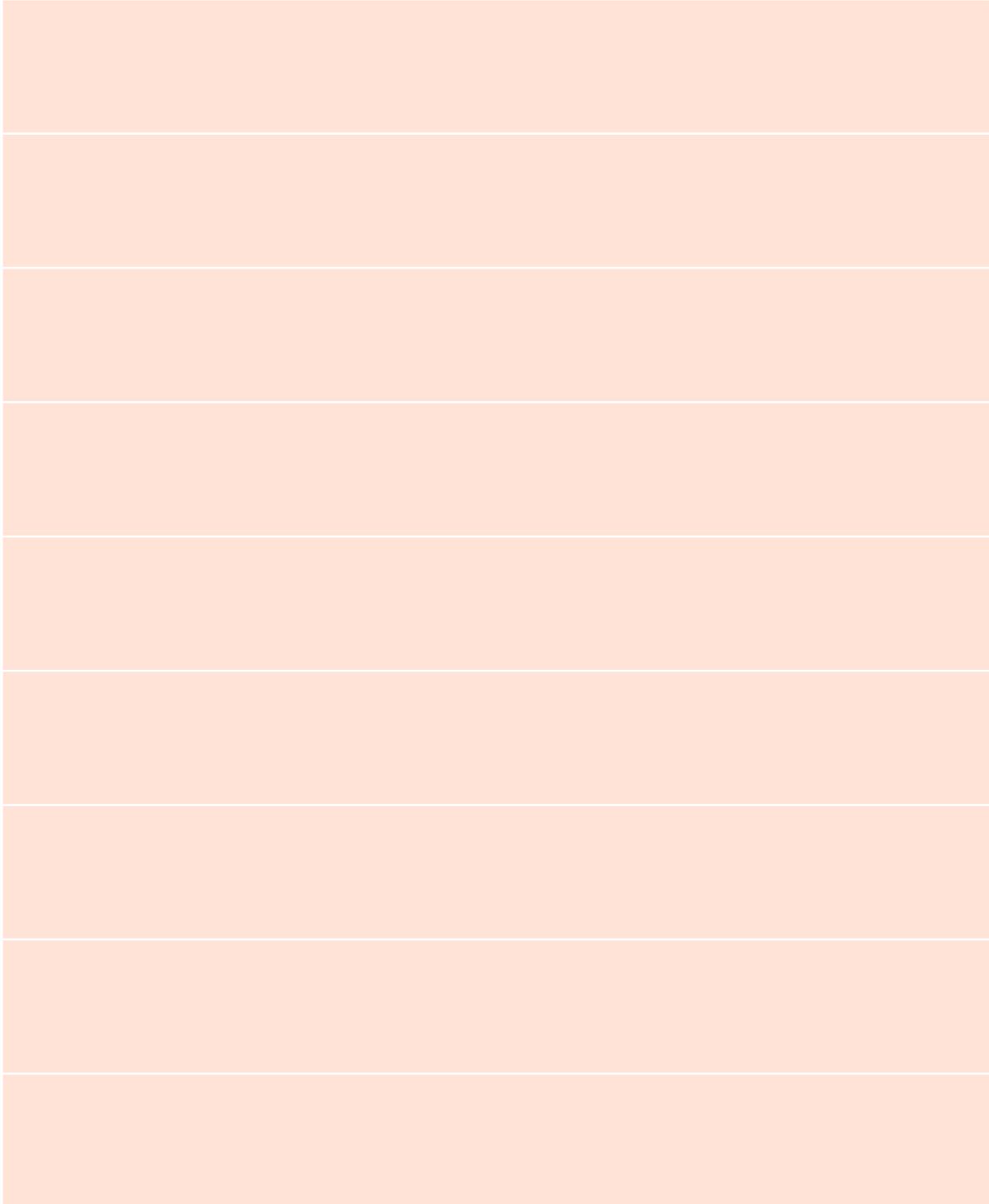
Trends...

What major trends are emerging in your markets? In the economy? Politically? Culturally? Where is technology leading? Describe how business is being done in your market 5 years from now. . .



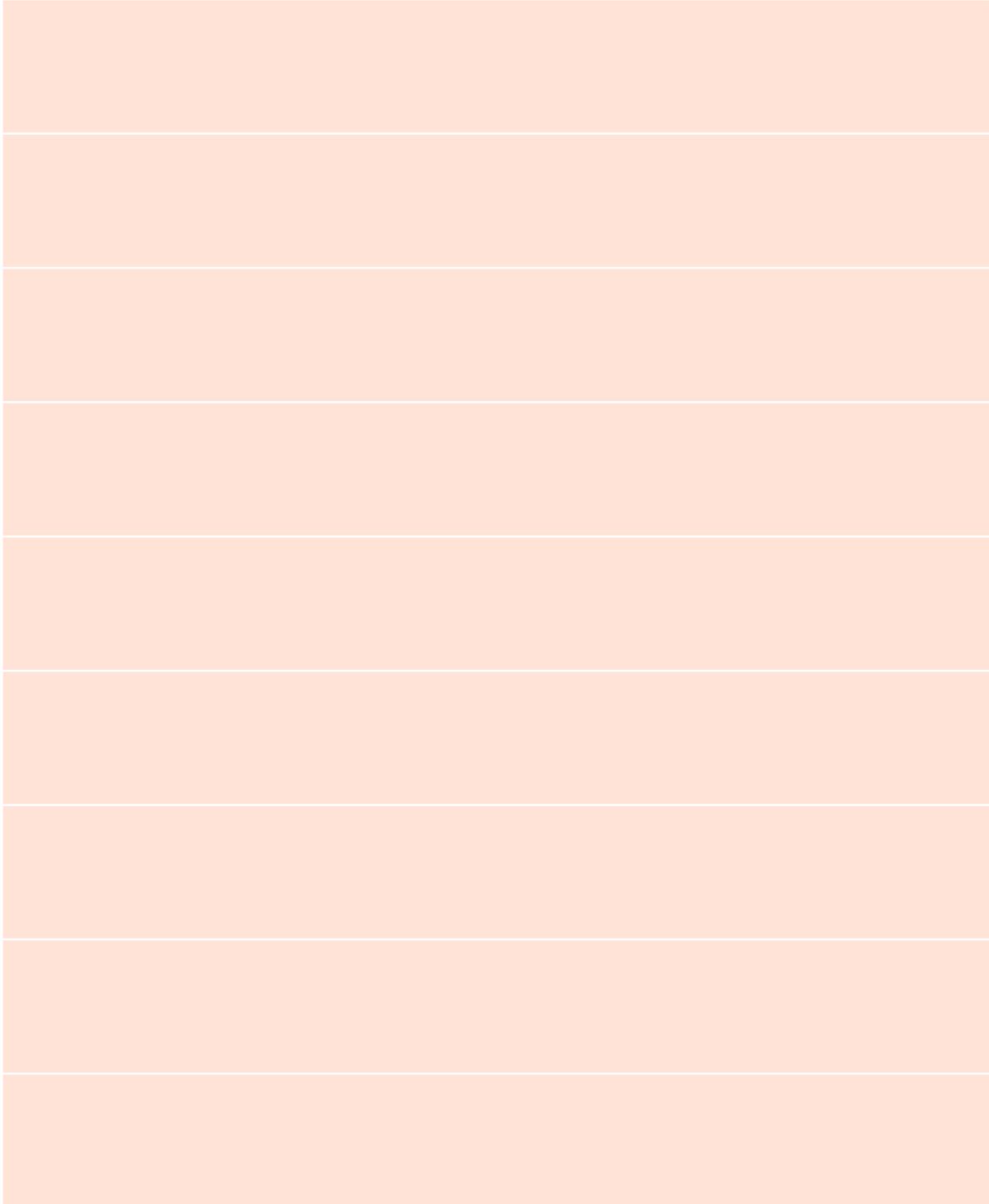
Assumptions...

What is going to be same in your industry 5 years from now? How do you know? What is going to start or stop happening? What will increase or decrease? Are you sure?



N-Joy...

What are the passions of your organization, team and self? What do you love doing? Forget logic for a minute. If you had a magic wand - what would you do, pursue, learn? Who would you serve?



Critical Issues -- Causes -- Impact

Focus on what's important. . .

Look over your FAST SCAN worksheets. Out of everything listed, what are the 3, 4, or 5 issues that are most critical to the future of your organization or team? Which are most threatening? Next, list their causes and impacts. Your strategy must deal with these above all else.

| <i>Critical Issue</i> | <i>Causes</i> | <i>Impacts</i> |
|-----------------------|---------------|----------------|
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Vision Statement

THIS is where we are going!

Your vision of where your organization is going can have more impact on it's actions than where it has come from.

Consider your challenges and critical issues and opportunities. Then transform them into a vision of where you want to go. What you really want for the organization and yourself.

Think about:

- Your core identity
- Your purpose
- Your profit potential
- Your customers - and how many you serve
- Your organization's culture

THIS is where we are going!

Distill all those elements into a clear, crisp, specific vision of the future.

Our Vision

By _____ (3-5 years in future), we are serving
_____(customers/segments), by offering
_____(products or services or value), and our organization
is _____(big, specific financial or market objective).

Obstacle Identification

If you have a vision -- you have obstacles

The minute you shape a clear vision of the future you will have obstacles. And if you don't see them right away - you will run into nay-sayers who point them out to you soon enough.

The smart way to create a strategy is to look clearly at those obstacles, then plan around, over, under or through them. Ignore the icebergs in the water, and your strategy will go down like the Titanic.

Which of the following obstacles do you need to consider?

| | | |
|------------------|-------------------------------|------------------------|
| Money | Time | Knowledge |
| Skills | People | Competitors |
| Customers | Offerings (products/services) | Economic forces |
| Political forces | Market forces | Attitudes and culture? |
| Doubt and Fear | ? | ? |
| ? | ? | ? |

Your biggest obstacles. . .

Now, looking over your obstacles -- which are the three biggest you must consider and plan for when crafting your strategy?

| | |
|-------------|--|
| Obstacle #1 | |
| Obstacle #2 | |
| Obstacle #3 | |

Discovering Your Hidden Resources

Resources form the bricks and mortar of strategy

Now that you have a clear view of where you are, where you are going and what is in the way, it's time to look for the resources that can be harnessed to help you achieve victory.

Looking at your situation through the window of your vision can open your mind to new resources.

Here's a list to get you started thinking. . .

Which of the following can you use to achieve victory?

| | | |
|-------------------------------|----------------|-------------------------------|
| Money: yours - other people's | Time | Knowledge: teams, books, etc. |
| Relationships | Advisors | Competitors resources |
| Customers | Past customers | Stakeholders |
| Skills and talents | Trends | Non-competitive businesses |
| ? | ? | ? |
| ? | ? | ? |

Your best resources. . .

Now, looking over your resources -- which three or four hold the best potential for helping you achieve your vision?

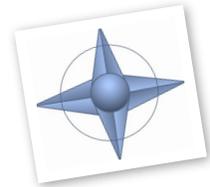
| | |
|-------------|--|
| Resource #1 | |
| Resource #2 | |
| Resource #3 | |

Strategy Formulation

Turning Ideas into Action

Now it is time to choose three major strategic solutions that can carry you to your vision.

The best practice here is to scan your critical issues worksheet, your vision statement, your obstacles worksheet and your resources worksheet.



As you scan, start writing out as many ideas as you can. Strategies are simply major directions and solutions that can carry you to victory.

Once you have made your list of ideas, many of them will be tactical. So, start to merge them into major categories. As you do, you'll find the categories become your major strategies. And the tactics in each, of course, are the tactics you'll deploy to achieve the strategy.

Each strategy will have many tactics. And each tactic you chose should have a "Who is going to do how much of what by when" attached.

In the worksheets on the following pages you can list the major strategy, and below each, the tactics in a Who, what, when table.

This chart becomes how you track, measure and implement your strategies.

Remember, if something isn't working, first tweak or change tactics. Only then change strategies. And only when your strategies are not working, change your vision.

Often we give up on our organization's vision too soon and our tactics too late.

This is the toughest step for the "Idea men and women." Work through it. It's the only way to transform ideas into action and action into vision!



Strategy #1 _____

Description of Strategy

| Tactic | Who? | What? | When? |
|--------|------|-------|-------|
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Strategy #2 _____

Description of Strategy

| Tactic | Who? | What? | When? |
|--------|------|-------|-------|
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Strategy #3 _____

Description of Strategy

| Tactic | Who? | What? | When? |
|--------|------|-------|-------|
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