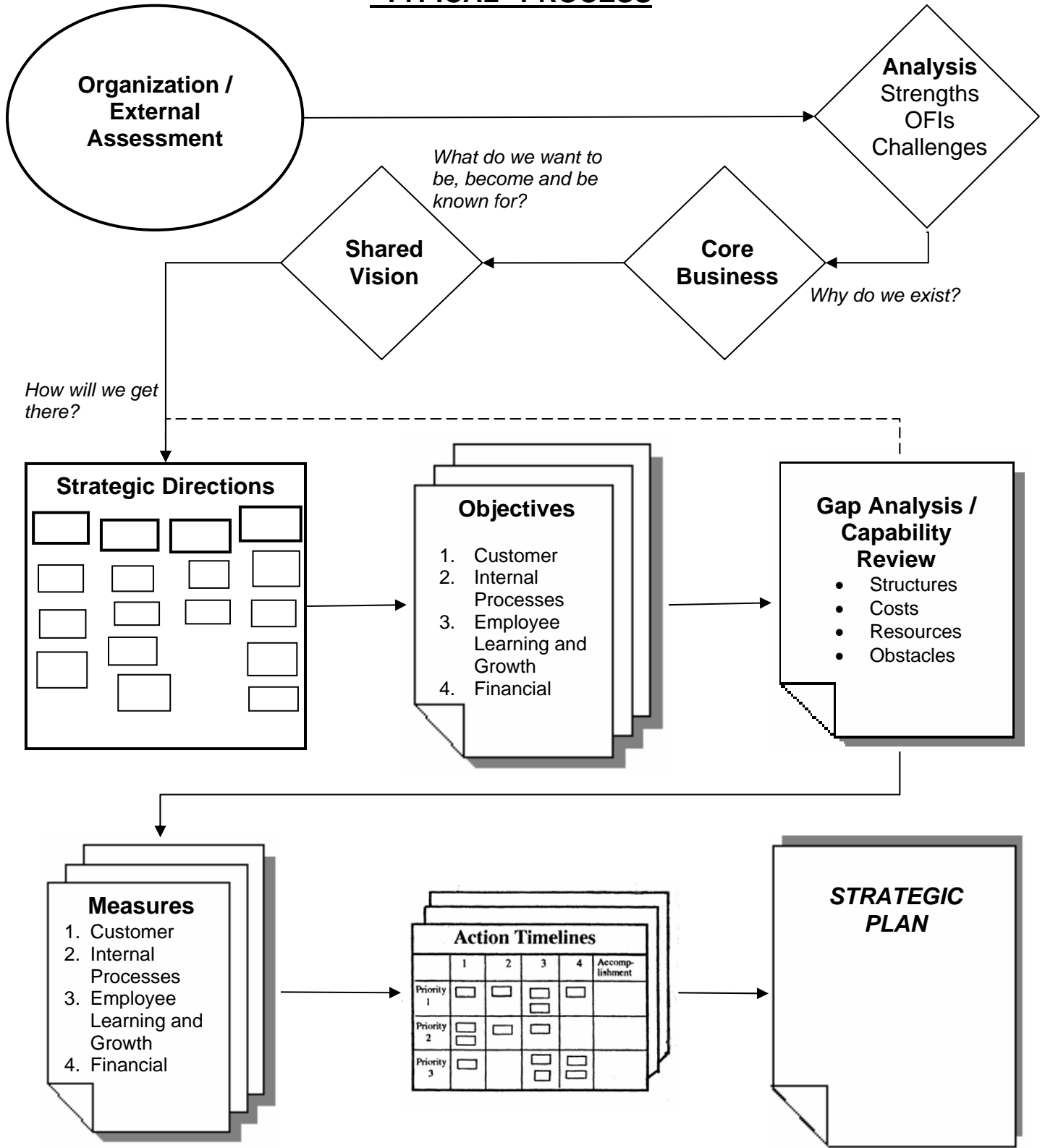


**Strategic Planning
"TYPICAL" PROCESS**



Strategic Planning Process

FOUNDATION	<ol style="list-style-type: none"> 1. Organization / External Assessment <ol style="list-style-type: none"> a. History b. Trends c. Accomplishments / Setbacks 2. Analysis <ol style="list-style-type: none"> a. Assets / Liabilities b. Strengths c. OFIs 3. Our Core Business <ol style="list-style-type: none"> a. Mission: Why do we exist? What is our purpose? b. What fundamental values guide our organization (really)? c. What is our value proposition? d. What is our Motive force¹? 			
STRATEGIC	<ol style="list-style-type: none"> 4. Shared Vision <ol style="list-style-type: none"> a. What do we want to be, become or be known for? OR b. Optional futures through strategic profiling (next page) 5. Strategic Directions <ol style="list-style-type: none"> a. What must be in place for us to achieve our vision? OR b. (Goals) What results do we need to achieve? 			
TACTICAL	<ol style="list-style-type: none"> 6. Objectives: What must we do well in order to implement our strategies? <ol style="list-style-type: none"> a. (Strategy-specific objectives) b. Customer c. Financial d. Internal Processes e. Employee Learning & Growth <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 33%; padding: 5px;"> <ol style="list-style-type: none"> 7. Capability Review <ol style="list-style-type: none"> a. Structures b. Costs c. Resources d. Obstacles </td> <td style="width: 33%; padding: 5px;"> <ol style="list-style-type: none"> 8. Measures <ol style="list-style-type: none"> a. Customer b. Financial c. Internal d. Employee Learning and Growth </td> <td style="width: 33%; padding: 5px;"> <ol style="list-style-type: none"> 9. Action Planning <ol style="list-style-type: none"> a. What b. Who c. By When </td> </tr> </table>	<ol style="list-style-type: none"> 7. Capability Review <ol style="list-style-type: none"> a. Structures b. Costs c. Resources d. Obstacles 	<ol style="list-style-type: none"> 8. Measures <ol style="list-style-type: none"> a. Customer b. Financial c. Internal d. Employee Learning and Growth 	<ol style="list-style-type: none"> 9. Action Planning <ol style="list-style-type: none"> a. What b. Who c. By When
<ol style="list-style-type: none"> 7. Capability Review <ol style="list-style-type: none"> a. Structures b. Costs c. Resources d. Obstacles 	<ol style="list-style-type: none"> 8. Measures <ol style="list-style-type: none"> a. Customer b. Financial c. Internal d. Employee Learning and Growth 	<ol style="list-style-type: none"> 9. Action Planning <ol style="list-style-type: none"> a. What b. Who c. By When 		

¹ "A particularly lucrative, desirable, competitive, or other strength that the organization now possesses or wishes to develop in order to reach its desired future." What are we driven by? What our customer's require? Our methods of service? Depending upon the client, this may be part of the pre-work.

Strategic Profiling²

An aid to strategic thinking. Based upon its value proposition, motive force, and other current realities, the Client determines in what areas, and to what levels, it will focus its efforts in order to maximize growth. Note that the “tilt” of the chart is from right to left, i.e., products or services which are Breakthrough today will become standard over time – the organization must continually innovate and allocate resources to maintain its competitiveness.

	Competitive (maintains competitiveness)	Distinct (gains competitive edge)	Breakthrough (achieves dominance)
Product (Tangible purchase)			
Service (Intangible purchase)			
Relationship (Intangible non-purchase)			

² This table is from Dr. Alan Weiss' book *Process Visuals*.