

Competent, Credible and Trustworthy Expertise When You Need It

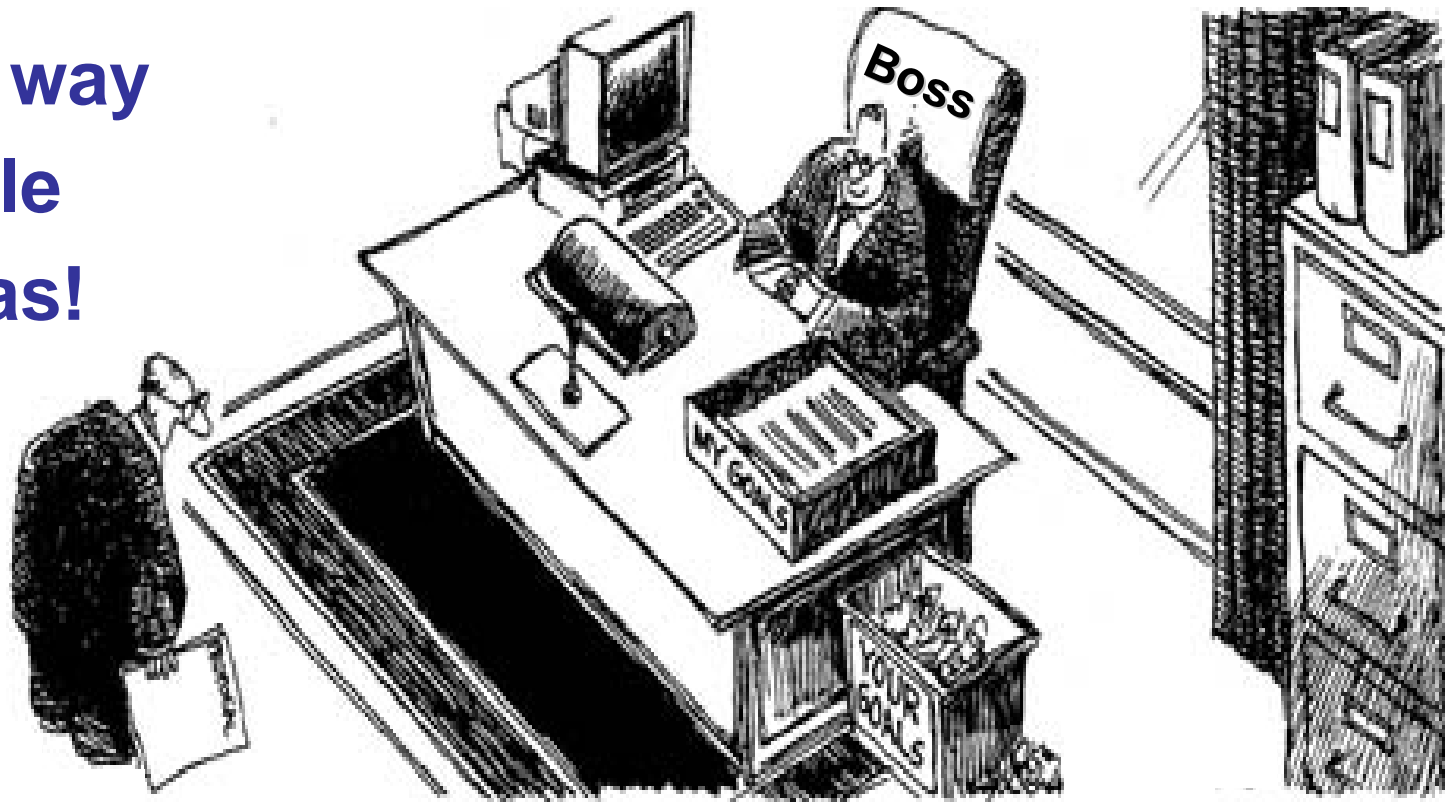


GlobalSolve™ Management Services

STRATEGIC PLANNING



**Our usual way
to handle
new ideas!**



Expectations





My Question is: “*Are we making a positive impact?*”

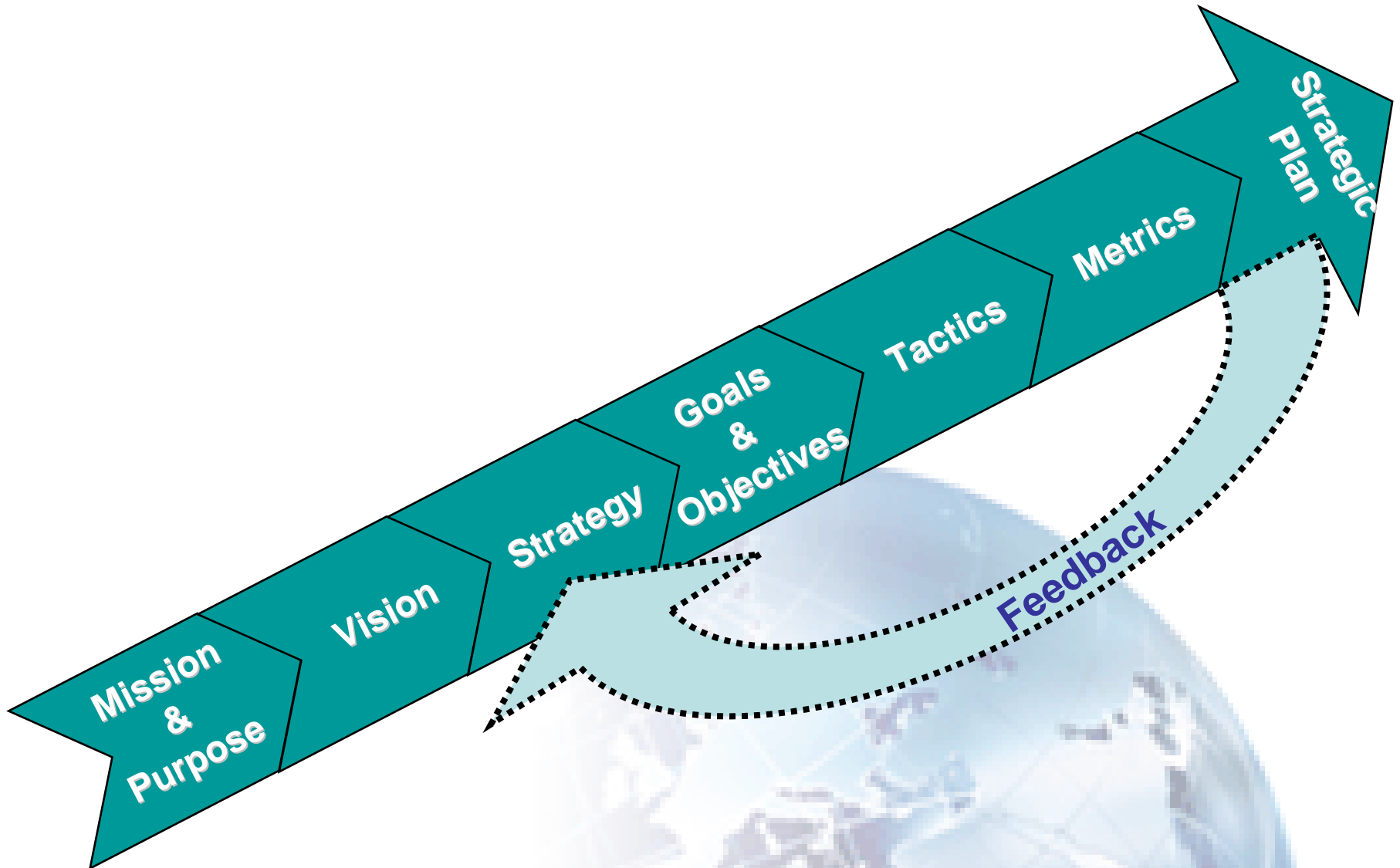
Strategic Planning Process

- ✓ **What should the enterprise be?**
- ✓ **Where is the enterprise now?**
- ✓ **What route should be taken to get there?**
- ✓ **How do we move along that route?**
- ✓ **How will we know when we are there?**
- ✓ **Do we still want to be there when we get there?**

What We Want To Accomplish

- ✓ **What should the enterprise be?**
- ✓ **Where is enterprise now?**
- ✓ **What route should be taken to get there?**
- ✓ **How do we move along that route?**
- ✓ **How will we know when we are there?**
- ✓ **Do we still want to be there when we get there?**

Strategic Planning Process



Enterprise Alignment

The Need For Strategic Planning

If you don't know where you're going....

- 1. Any road will take you there**
- 2. It's because you don't know where you've been**
- 3. You'll probably end up somewhere else**
- 4. You probably won't get there**
- 5. Anywhere will do**
- 6. All of the above**



Starting Point

MISSION:

VISION:



Goals





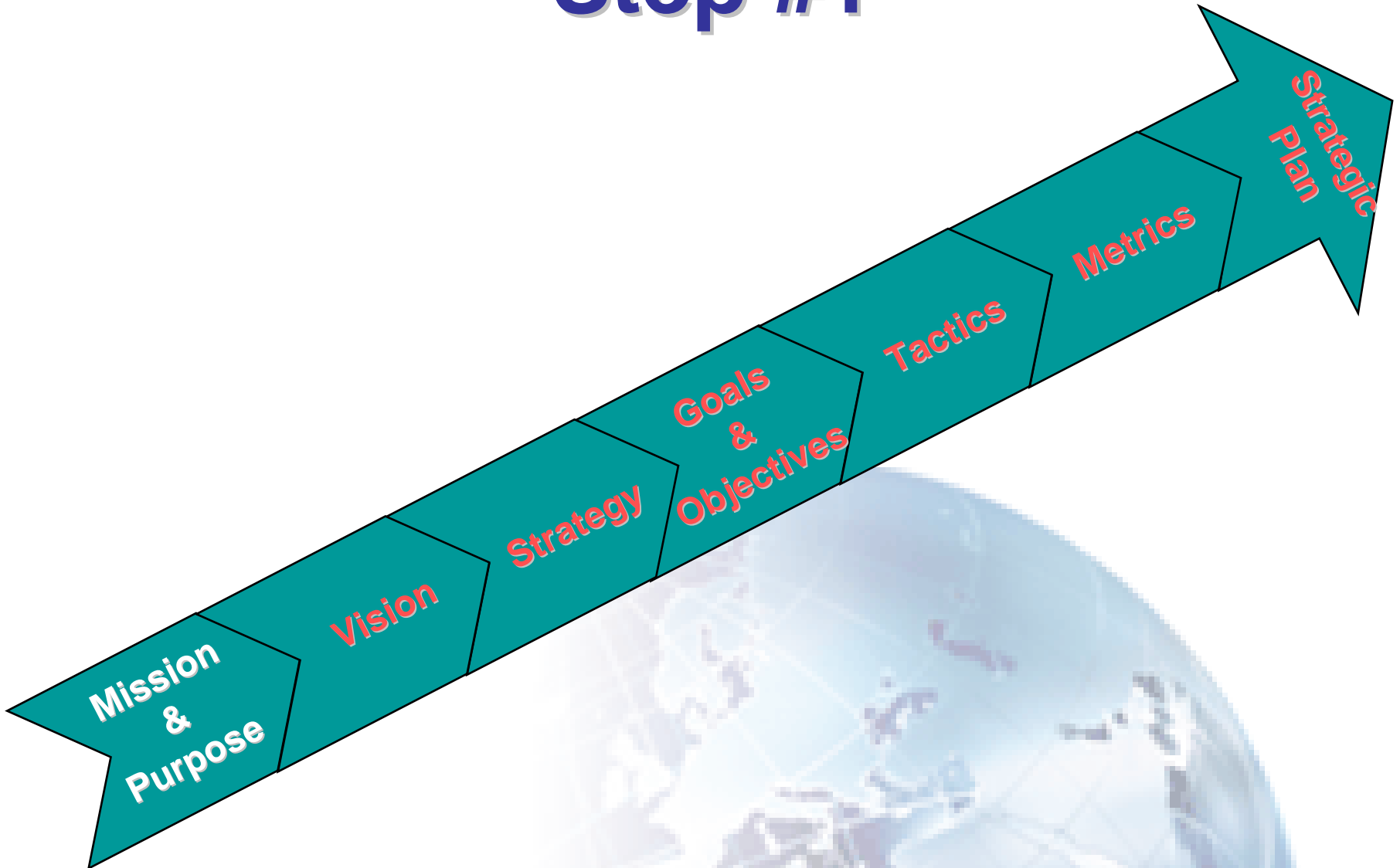








Step #1



Purpose Alignment

- 1. What is the purpose of the enterprise as it relates to other strategies?**
- 2. What is the purpose of the enterprise as it relates to YOUR functional area?**
- 3. What are the areas of common purpose?**
- 4. Where is there divergence, disagreement or possibly conflict?**

Purpose Alignment Exercise

(Individual Group Results)













Purpose Alignment Exercise

(Consolidated Results)













Step #2



Vision Exercise

	WHERE DO WE WANT TO GO?	HOW ARE WE GOING TO GET THERE?	WHEN DO WE WANT TO GET THERE?	HOW DO WE KNOW WE'RE THERE?	CAN WE GET THERE? (Reality Check)
1					
2					
3					
4					
5					
6					
7					

Baseline Exercise

	WHERE DO WE WANT TO GO?	HOW ARE WE GOING TO GET THERE?	WHEN DO WE WANT TO GET THERE?	HOW DO WE KNOW WE'RE THERE?	CAN WE GET THERE? (Reality Check)	WHERE ARE WE NOW?
1						
2						
3						
4						
5						
6						
7						

S.W.O.T. Analysis

	Strengths	Weaknesses	Opportunities	Threats
Competition				
Resources				
Employment Market				
Business Community				
Market Demographics				

S.W.O.T. Analysis

(Group Exercise)

	Strengths	Weaknesses	Opportunities	Threats
C	•	•	•	•
O	•	•	•	•
M	•	•	•	•
P	•	•	•	•
E	•	•	•	•
T	•	•	•	•
T	•	•	•	•
I	•	•	•	•
O	•	•	•	•
N	•	•	•	•

S.W.O.T. Analysis

(Group Exercise)

	Strengths	Weaknesses	Opportunities	Threats
R	•	•	•	•
E	•	•	•	•
S	•	•	•	•
O	•	•	•	•
U	•	•	•	•
R	•	•	•	•
C	•	•	•	•
S	•	•	•	•
E	•	•	•	•
S	•	•	•	•

S.W.O.T. Analysis

(Group Exercise)

		Strengths	Weaknesses	Opportunities	Threats
E M P L O Y M E N T	M A R K E T	<ul style="list-style-type: none"> • • • • • • • • • • 	<ul style="list-style-type: none"> • • • • • • • • • • 	<ul style="list-style-type: none"> • • • • • • • • • • 	<ul style="list-style-type: none"> • • • • • • • • • •

S.W.O.T. Analysis

(Group Exercise)

		Strengths	Weaknesses	Opportunities	Threats
B U S I N E S S	C O M M U N I T Y	<ul style="list-style-type: none"> • • • • • • • • • • 	<ul style="list-style-type: none"> • • • • • • • • • • 	<ul style="list-style-type: none"> • • • • • • • • • • 	<ul style="list-style-type: none"> • • • • • • • • • •

S.W.O.T. Analysis

(Group Exercise)

		Strengths	Weaknesses	Opportunities	Threats
M A R K E T	D E M O G R A P H I C S	•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•
		•	•	•	•

Step #3



Strategy Design

- **WHAT DO WE DO** to get “there”?
- **HOW** will we get “there”?
- **HOW LONG** will it take to get “there”?
- **WHAT RESOURCES** will be necessary?
- **WHO IS RESPONSIBLE** to get us “there”?
- Is “there” consistency within the vision, mission, purpose and goals of management and enterprise?

STRATEGY vs. TACTICS

Strategy is an overall map that guides the use of tools toward clear goals.

- Strategy is rooted in a plan of action to accomplish specific goals that are usually important and challenging
- Strategy involves proactively determining what you want to achieve
- Strategy is a hard-nosed assessment of where you are, where you want to go, and how you can get there
- Tactics are the way the strategy is carried out
- Tactics are the things you do to achieve the strategic goal
- Tactics are specific actions

Strategy Development Exercises

1. Entire Group – Scenario Analyses

- Service Quadrant evaluation
- Group discussion and agreement on market position

2. Small Groups – Strategy Development

- 2 to 3 realistic and achievable strategies

3. Entire Group – Agreement

- 2 to 3 realistic and achievable strategies

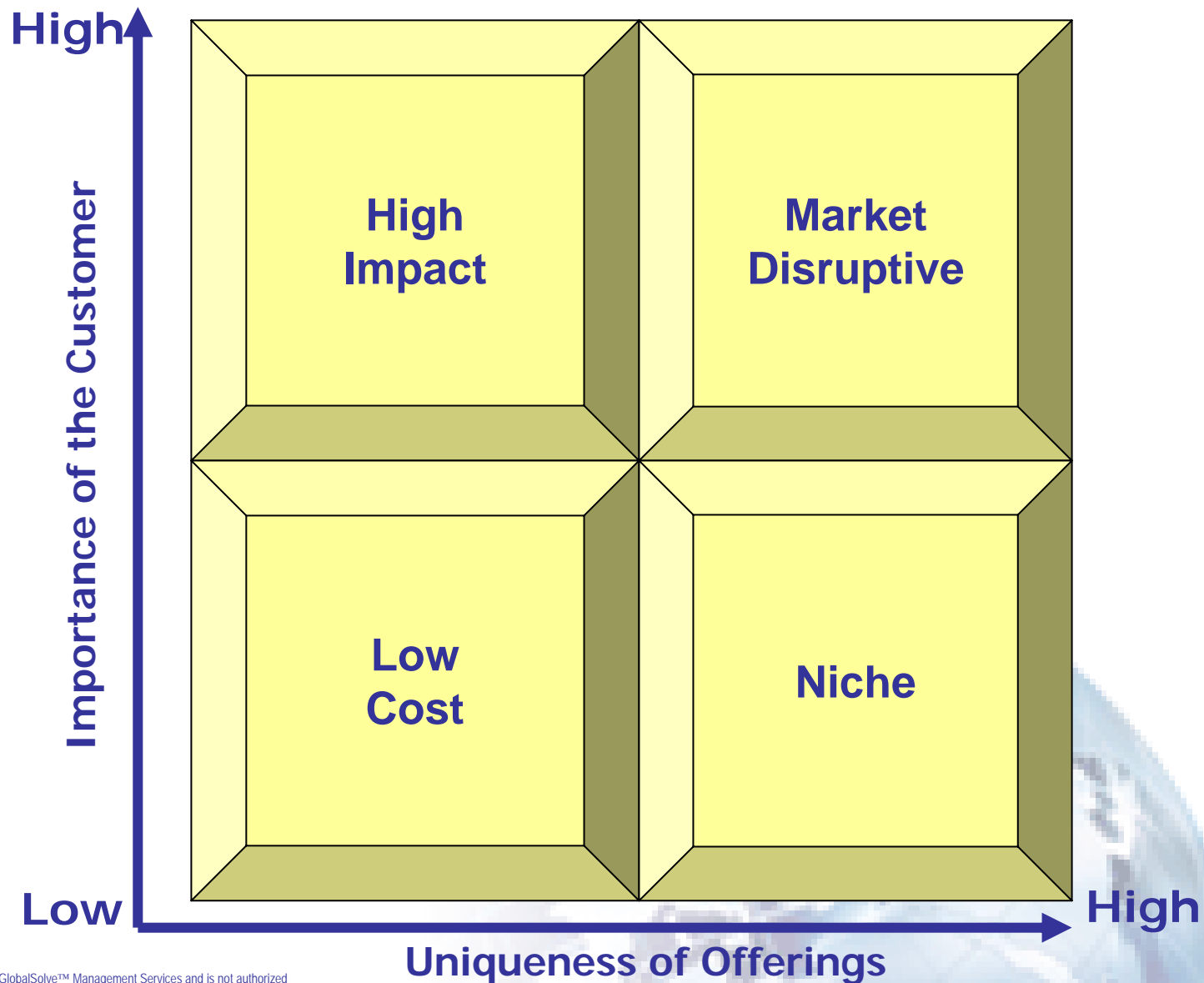
Input to strategy statement development process, to be completed in near-term

Strategy Development

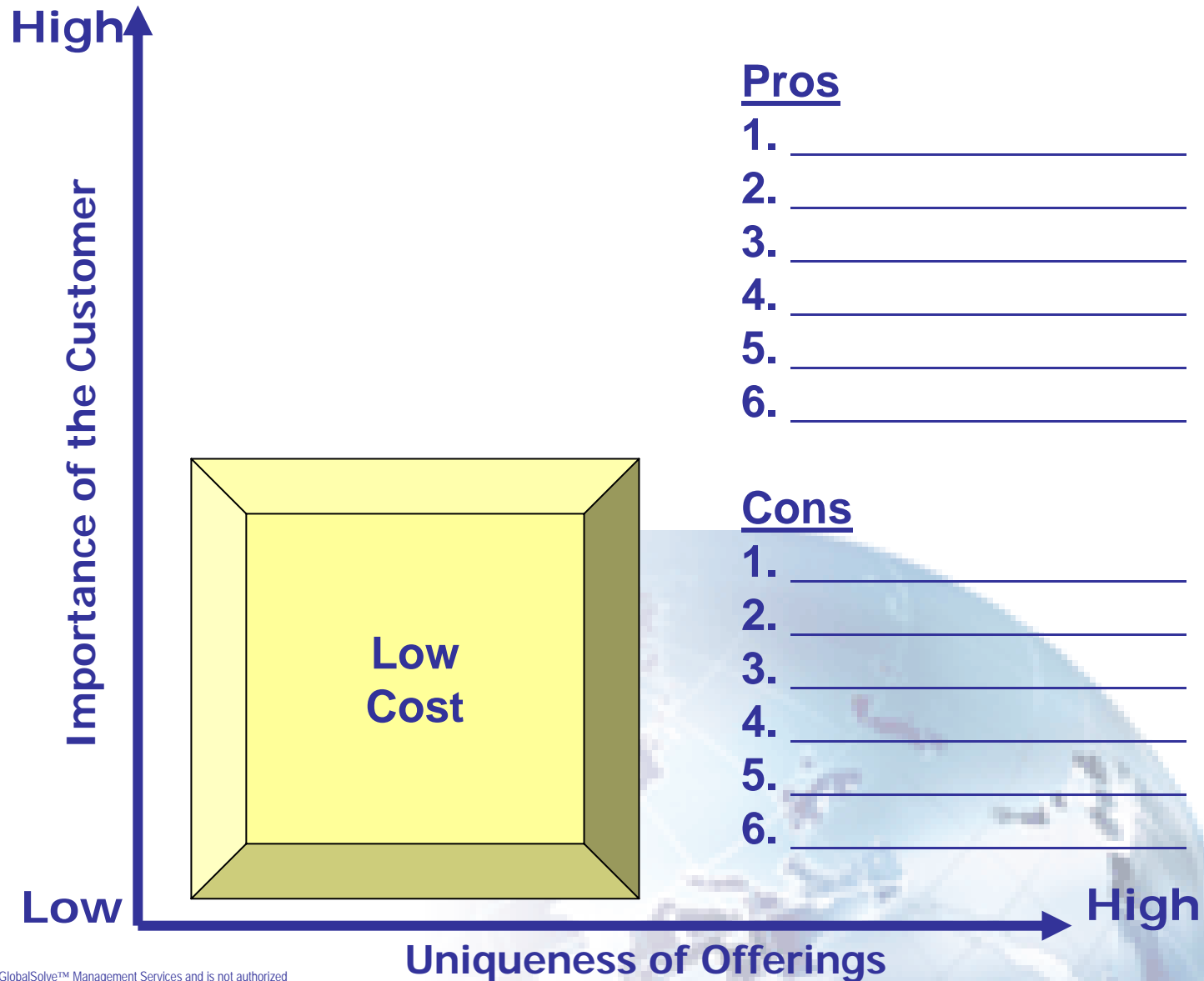
Market Positioning Methodology



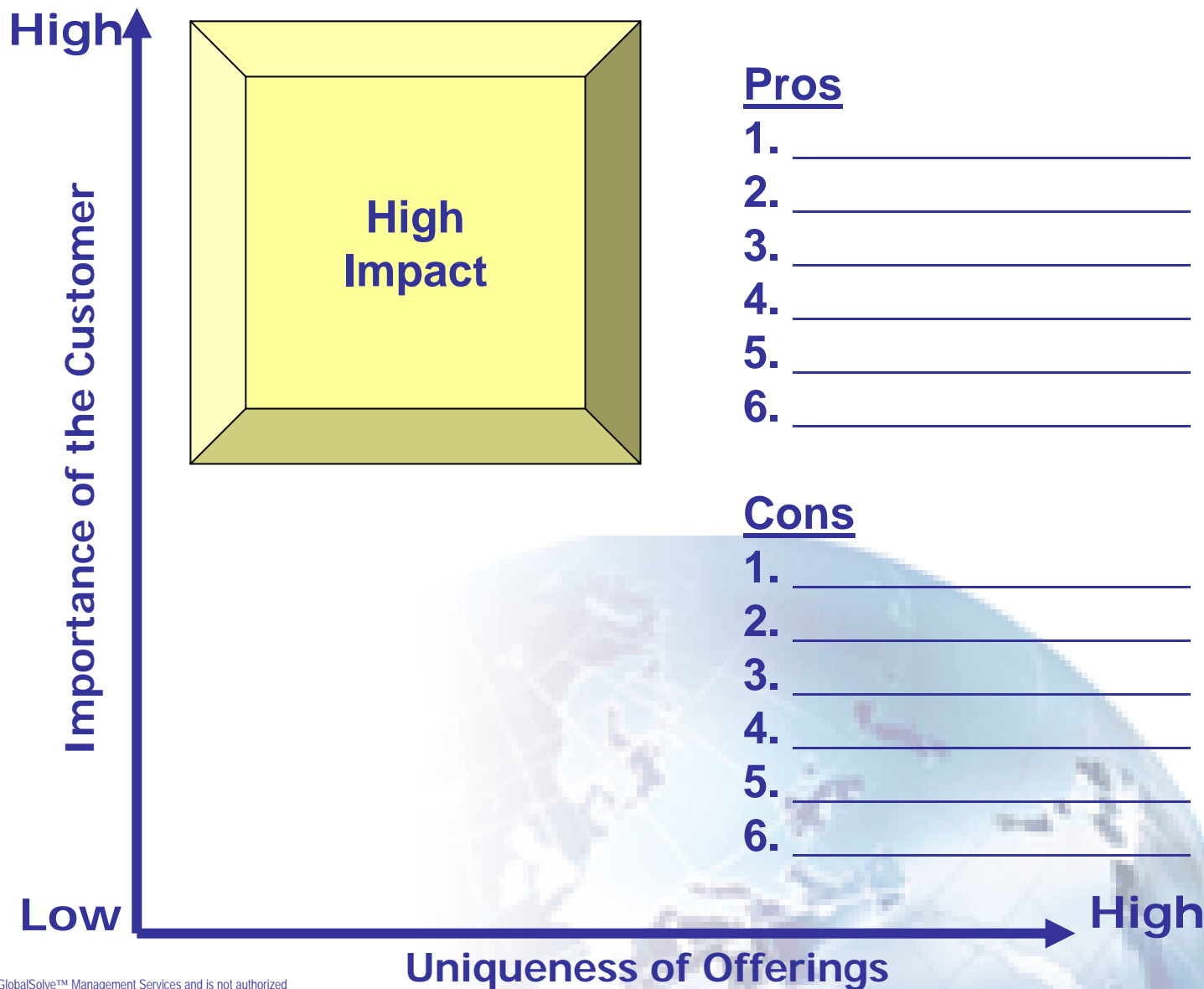
Market Position Strategies



Group Exercise: Pros and Cons



Group Exercise: Pros and Cons



Group Exercise: Pros and Cons

High

Importance of the Customer

Pros

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Market Disruptive

Cons

1. _____

2. _____

3. _____

4. _____

5. _____

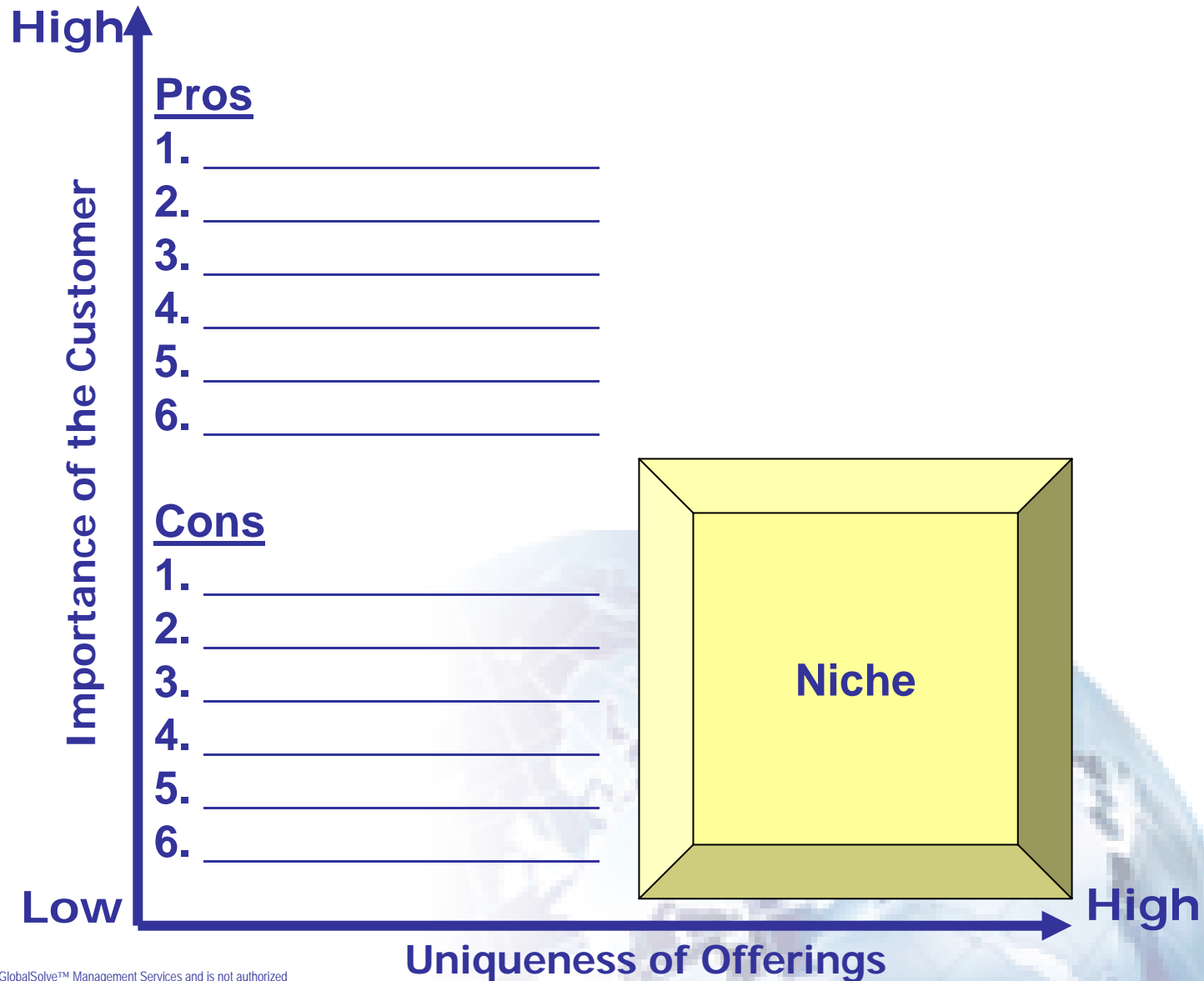
6. _____

Low

Uniqueness of Offerings

High

Group Exercise: Pros and Cons



Strategies Consensus

1.

2.

3.



Step #4





Goals & Objectives Exercise



Goals Exercise

- 1. Entire Group – Scenario Analyses**
 - Strategy evaluation “warm up”
 - Group discussion about likely goals
- 2. Small Groups – Strategy Development**
 - 2 to 3 realistic and achievable goals
- 3. Entire Group – Agreement**
 - 2 to 3 realistic and achievable goals

Input to goals statement development process, to be completed in near-term

Step #5



Tactics Exercise



Tactical Plan

- What are the key steps that we need to take to get “there”?
- What are the milestones for the plan?
- Who will do what? Who will be accountable?
- What metrics should we use to measure our progress?
- Should there be “decision gates”?

Tactics Exercise

1. Entire Group - Aggregation

- Open end contribution of Tactics for Strategy #1
- Refinement

2. Entire Group - Refinement

- 5 to 8 key, realistic and achievable strategies

3. Entire Group – Do it again!!

- Repeat for Strategy #2 and Strategy #3

Input to tactics statement development process, to be completed in near-term

Strategy #1 Tactics

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____



Strategy #2 Tactics

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____

- _____



Strategy #3 Tactics

- _____

- _____

- _____

- _____

- _____

- _____

- _____

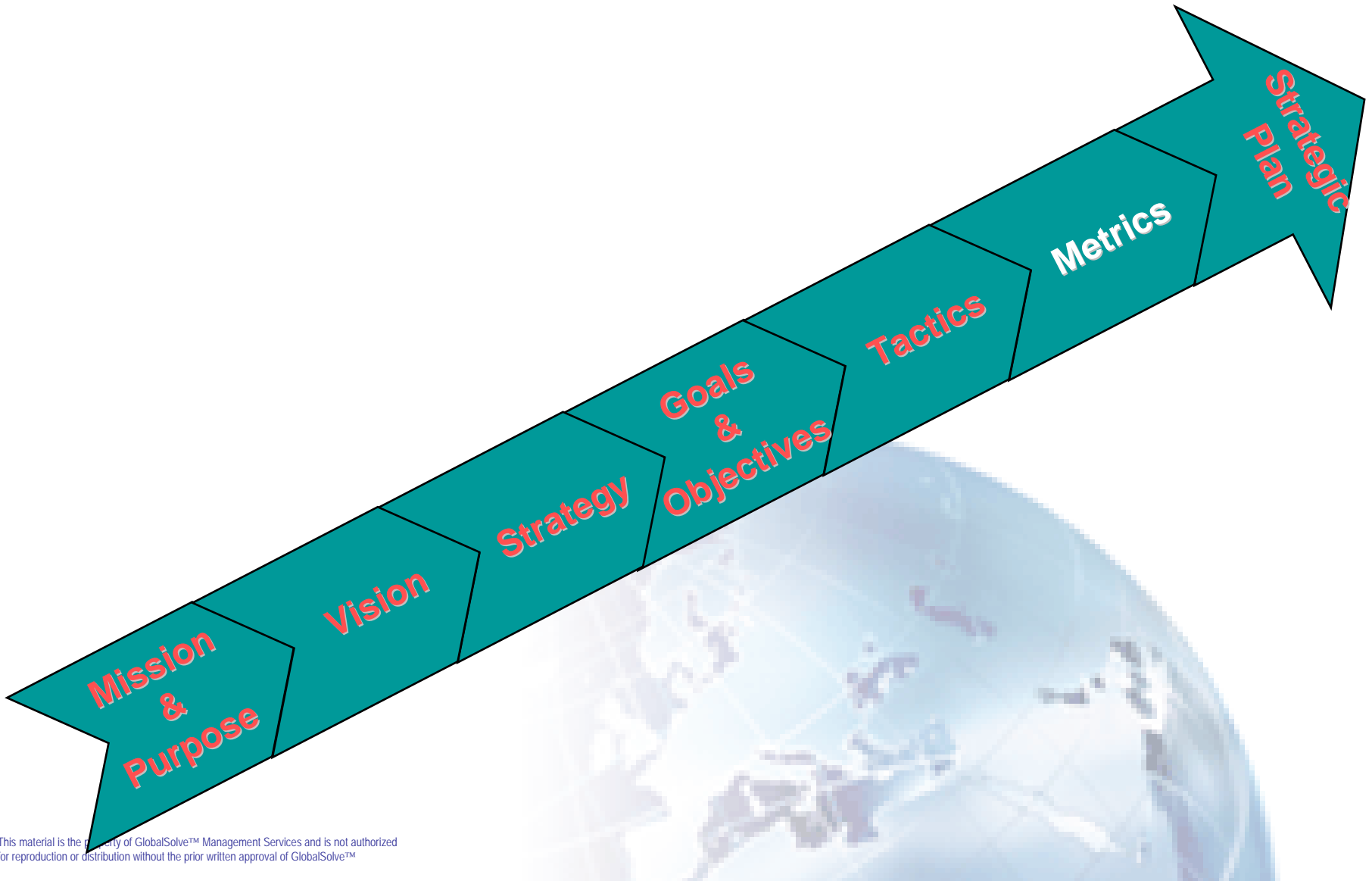
- _____

- _____

- _____



Step #6



Metrics Exercise



Metrics Exercise

1. Individual Observers

- Fill tactics in each Strategy Metric Table

2. Entire Group – Complete Table Inputs

- Strive for consensus; leave blanks in unknown

3. Entire Group – Do It Again!!

- Repeat for Strategy #2 and Strategy #3

Input to metrics table development process, to be completed in near-term

Strategy #1 Tactics - Metrics

Tactic	Responsibility	Resources Required	When Finished	Inter-relationships	Feedback Required

Strategy #2 Tactics - Metrics

Tactic	Responsibility	Resources Required	When Finished	Inter-relationships	Feedback Required

Strategy #3 Tactics - Metrics

Tactic	Responsibility	Resources Required	When Finished	Inter-relationships	Feedback Required

Step #7

