

# STRATEGIC PLANNING GUIDEBOOK

BUILD YOUR STRATEGIC PLAN

BREAK IT DOWN AND

EXECUTE AGAINST IT

Your guidebook to holding your best strategic planning session ever!





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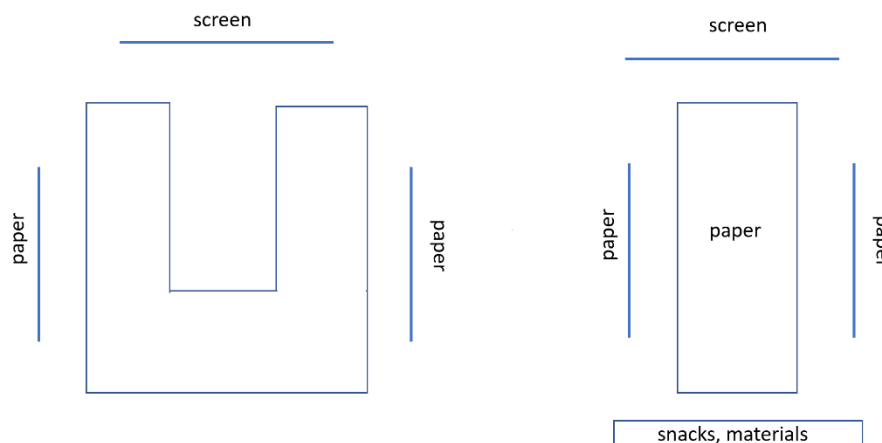
## SETTING UP FOR THE SESSION

### Preparing for the session:

- Share agenda prior to the session, include requests for any data or materials you would like them to bring
- Create a deck that will keep the conversation on-track
  - Note: The focus should be on the work, not on the deck
- Pull any data or resources you need
- Plan for snacks and meals
- Determine if you need an assigned scribe or if the facilitator will manage all notes. If you are bringing in:
  - Outside facilitator: Plan planning session with them
  - Scribe: Review expectations with the scribe

### Room set up:

- Arrange the room in a horseshoe shape or have everyone sit around a single table (depending on group size)
- Have two flip charts for capturing parking lot items and issues
  - Parking lot items are those thought and ideas that come up, they don't fit in this meeting and are owned by leadership. Assign ownership at the end of the meeting.
  - Issues are business issues that come up, need to be addresses and will be scheduled to be addresses at the end of the meeting.
- Create a space for affinity map exercises. Ways to do this include:
  - Use a large white board
  - Craft paper on the wall
  - Craft paper on the table.
- Make sure you have plenty of markers, pens and sticky notes, some should be placed in front of each person



# SETTING A PLAN FOR THE FUTURE

Your Strategy documents your purpose and sets up the plan to meet get you where you want your company to go.

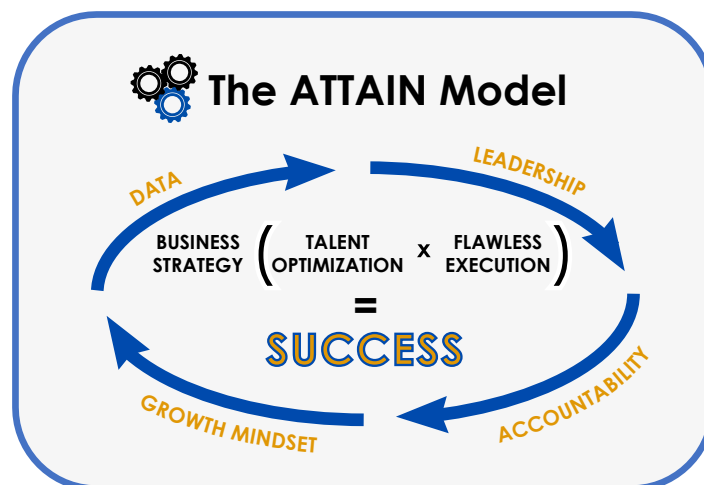
Strategic planning sets the direction for your business or organization. It is an inherently messy process, that will require data, insight, introspection, and time. Additionally, your strategy is always a work in progress. You'll need to revisit it on a yearly basis and look at it each quarter to ensure you are executing against it.

Your goal is to have a plan you can execute against to the achieve the results you envision. **Most companies don't have a plan and only a few that have a plan execute against it.**

Holding a yearly strategic planning session with your leadership team will focus your work and ensure you are aligned with your mission, vision and values. Strategic planning putting in place a process for execution. A plan on the shelf is not much better than no plan at all.

## A Strategic Plan:

- Sets the vision for your organization
- Gets everyone on the same page and going the same direction
- Is aligned with your mission and vision
- Supports your company (and personal) values
- Creates the execution structure that focusses your work
- Keeps everyone focused through the ups and downs of business (even a global pandemic!).



# START WITH THE BIG PICTURE: 5-10 Year Vision

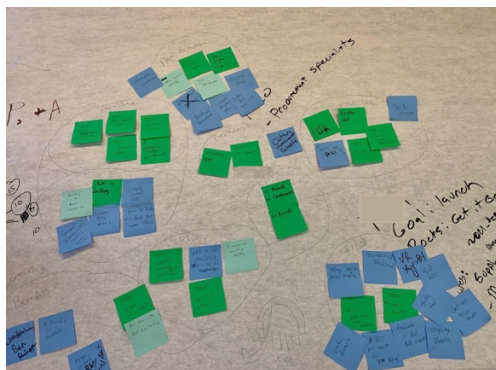
Just like taking a road trip, you need to know where you are going before you can map out how to get there. So, we start with creating a vision of where your business will be in 10 years (if 10 years is too far out, create a 5-year vision). **Dream big, you only achieve what you aspire to!**

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## Activity: Affinity Mapping

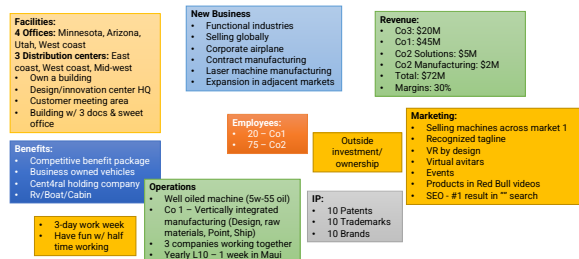
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- **Individual activity:** On post-it notes: Each individual writes down ideas of how they view the organization will be in 10 years.
- **Facilitator/group exercise:** Post all the ideas on the wall, group them according based on like areas. Areas may include:
  - Financial
  - Employees
  - Products
  - Markets
  - Infrastructure
  - Lifestyles
  - Assets
- **Discuss:** Discuss each area and the details.
  - What are we in agreement on?
  - Do we agree on what we should look like long-term?
  - Are we comfortable with this vision?



Plan for the Future

## 10-year Target™ Affinity Map



*Most people underestimate what they can do in 10 years and overestimate what they can do in one year.*

# MISSION AND VISION

**Your mission statement drives the company.** It is what you do/the core of the business, and from it come the objectives and finally, what it takes to reach those objectives. It also shapes your company’s culture.

- What do we do?
- Whom do we serve?
- How do we serve them?

**Your vision statement gives the company direction.** It defines the future of the business and its purpose.

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*Activity: Mission and vision*

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- If you have mission and vision statements: Revisit them!
- If you don’t have mission and visions statements, Create them!

<b>Company Mission:</b>
Version 1:
Version 2:

<b>Company Vision:</b>
Version 1:
Version 2:

**Sample Mission:** *Our Company Mission is to provide a world class experience to as many customers as possible starting in Minnesota and branching out nationwide.*

**Sample Vision:** *Engineering collaborators with rapid design and fab services far beyond our competitors.*

# AN ACTIONABLE TIMEFRAME: 3 years

Now that you know where you are going, it's time to start building a plan on how to get there. 10 years is too long for us to plan against, so the next step is to break this down to a 3-year vision. This gets you closer to actionable steps and ensures you are aligned to your 10-year vision. Additionally, it focuses your work aligned to your company vision and mission.

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## *Activity: Affinity mapping*

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- **Individual activity:** On post-it notes, have each individual writes down ideas of how they view the organization in 3 years.
- **Facilitator/group exercise:** Post all the ideas on the wall, group them according based on similar areas. Areas may include:
  - Financial
  - Employees
  - Products
  - Markets
  - Infrastructure
  - Lifestyles
  - Assets

### How to Affinity Map:

1. **Define the question on a whiteboard or flip chart.** For example: "How will our organization look in 3-years?"
2. **Ask participants for responses.** Have the participants write their responses on sticky notes or index cards.
3. **Collect and post ideas.**
4. **Sort the ideas into clusters.** Ask the participants to help you sort the ideas into common groups.
5. **Define categories.** Ask the participants to define category names or headings.
6. **Discuss the Affinity Map.** Ask participants for key observations. Ask probing questions to help everyone better understand the results.

When you complete the exercise, the team should have a deeper and more comprehensive understanding and common view.



- **Discuss:** Discuss each area and the details.
  - What are we in agreement on?
  
  - Do we agree on where we should be in 3-years?
  
  - Are these targets realistic?
  
  - If you hit meet your 3 years targets, will you be on-track to meet your 10-year vision?
  
  - Are we comfortable with this vision?
  
  - Are this in-line with your personal goals?
  
- Finalize the 3 year view.

# CORE VALUES

Your core values are a small set of guiding principles that are timeless and guide your company's actions.

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*Activity: Define your core values*

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Step 1 – Have each member list 3 people, who - if you could clone them - would lead you to market domination
Step 2 – List the characteristics those people embody:
Step 3 – Narrow down the list <ul style="list-style-type: none"><li>- Circle the ones that are truly important</li><li>- Draw a line through those that are not</li></ul>
Step 4 – Make the tough decisions to get your list down to between three and seven values:

Note: Once you've come up with your values, let them sit for 30 days, then revisit them before sharing.

Gino Wickman, Traction: Get a Grip on Your Business, Benbella Books, 2011, pg. 36-38

## **Airbnb Core Values:**

### **Champion the Mission**

We're united with our community to create a world where anyone can belong anywhere.

### **Be a Host**

We're caring, open, and encouraging to everyone we work with.

### **Embrace the Adventure**

We're driven by curiosity, optimism, and the belief that every person can grow.

### **Be a Cereal Entrepreneur**

We're determined and creative in transforming our bold ambitions into reality.

## **CampMinder Core Values:**

### **Put Team First**

With empathy and humility, we seek win-for-all solutions.

### **Own It**

We drive for results with passion, grit and determination. When faced with a challenge, we persevere.

### **Be Admirable**

Honoring our word and choosing candor, respect, and kindness.

### **Wonder**

Seeking to understand with curiosity and vulnerability.

### **Find a Better Way**

A culture of innovation and continuous improvement. Constantly seeking personal and professional growth.

### **Give Joy**

Laugh. Be grateful, positive and hospitable. Make people feel good.

# SWOT ANALYSIS

**SWOT analysis** is a strategic planning technique used to help a person or organization identify **Strengths, Weaknesses, Opportunities, and Threats** related to business competition or project planning.

A SWOT analysis can be done at different levels in the organization. Our goal in this exercise is to examine the strengths, weaknesses, opportunities, and threats to our business, and aligned to our 3-year and 10-year visions.

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Activity: Complete a SWOT analysis

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- **Facilitator:** Create a large SWOT on a whiteboard or flip chart
- **Individual activity:** On post-it notes have each individual write down the strengths you see for the organization
- Each person shares the post-its and places them on the chart
- Once all the strengths are posted, discuss them, group them, and modify as needed
- Complete the same exercise for Weaknesses, Opportunities and Threats
- Review the SWOT against your 3-year vision. How does it impact it and what modifications do you need to make?

<p style="text-align: center;"><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>- What do you do well?</li> <li>- What unique resources can you draw on?</li> <li>- What do others see as your strengths?</li> </ul>	<p style="text-align: center;"><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>- What could you improve?</li> <li>- Where do you have fewer resources than others?</li> <li>- What are others likely to see as weaknesses?</li> </ul>
<p style="text-align: center;"><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>- What opportunities are open to you?</li> <li>- What trends could you take advantage of?</li> <li>- How can you turn your strengths into opportunities?</li> </ul>	<p style="text-align: center;"><b>THREATS</b></p> <ul style="list-style-type: none"> <li>- What threats could harm you?</li> <li>- What is your competition doing?</li> <li>- What threats do your weaknesses expose to you?</li> </ul>

# CORE MARKET AND NICHE

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*Activity: Define your core market*

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## **Exercise 1:**

- Pick your top 5 customers.
- Define core characteristics of each customer:
  - Size
  - Products
  - Markets
  - Why they buy from you
  - Purchasing process
  - Relationship
- Complete an affinity map of these characteristics from these customers.

## **Exercise 2:**

- Pick your two hardest to serve clients.
- Define what makes them hard to serve.

# MARKETING STRATEGY

Define your go-to-market strategy. This includes:

- Marketing
- Sales
- Deliver
- Integration with product development
- Feedback loops



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*Activity: Use history to update your marketing strategy*

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- From your target market and niche exercises, discuss:
  - 3 wins that fit well with your target market and niche.
  - 2 misses that also fit well with your target market and niche.
- Use the 5Ys methodology to drill into why you did not win the two misses.
- Compare learnings to the 3 wins. What was different?
- Define how you are going to change your strategy to win in your target market.
- Update your marketing strategy!

# ONE-YEAR PLAN

Creating a plan for the next year, provides goals, direction and focus for your business. The one-year plan must be specific, measurable, actionable and aligned to your scorecard.

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*Activity: Define your plan for the next year*

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- Define your vision for the year. This should include:
  - Revenue:
  - Profit:
  - Any KPI you want to measure
  
- With the one-year vision in defined, revisit your 3-year vision.
  - Does your plan align with your 3-year vision?
  
  - Will successfully completing your plan move you to your 3-year vision?
  
- Is your 1-year plan attainable?
  
- Define what resources and changes are needed in the organization to meet your one-year plan. Include:
  - Budget
  
  - People
  
  - Skills
  
  - Equipment
  
- Review your current scorecard – will it need to change based on your plan?



# 90 DAY PLAN

Core to getting results is breaking your work up into 90-day chunks. As humans, we have a hard time concentrating on anything that lasts longer than 90 days.

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*Activity: Create a 90-day plan*

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- **Brainstorm as a group:** To meet your 1-year plan, what needs to be completed in the next 90 days? (EOS rocks)
- Prioritize your rocks:
  - Critical - needs to happen this quarter
  - Long term – Needs to happen but not this quarter
  - Nice to do
- Add to each rock: Impact of not doing the action.
- Assign rocks to accountable person.
  - Note: Each person should be limited to 5-7 rocks.
  - Note: Once a rock is completed, others can be added.

# SOLVE ISSUES

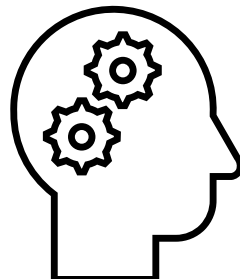
During the session, you should have noted any businesses issues that came up. Now is the time to resolve them.

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## *Activity: Issue resolution*

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- Prioritize the issues on the issues list. Determine the top 3 issues to be solved.
- For each issue:
  - Clearly identify the real issue
    - Einstein said *“If I had an hour to solve a problem I'd spend 55 minutes thinking about the problem and 5 minutes thinking about solutions.”*
    - What is first identified is typically a symptom of the issue.
    - Dig in and determine what the actual issue is.
    - Once you are sure you understand the problem, document it.
  - Discuss the problem
    - If you have clearly articulated the problem, this step is usually pretty quick!
  - Solve the problem
    - Determine the solution.
    - Assign to-dos from the solution – ensure it gets implemented!




# TALENT REVIEW

Conducting a regular talent review ensures each person is in the right seat and there is a plan for each person.

Prework: Each leader fills creates a slide for each of their direct reports.

- GWC rating (from EOS)
  - o Get it
  - o Want it
  - o Has the capacity to do it
- Aspirations
- Development plan
- Status
- Manager view
- Next role
- Actions

Talent Review – Dept Name

	<p>Name: Sally Smith Role: Supply Chain Leader Status: Next Role:</p>	<p>GWC: Do they Get it:</p> <p>Want it:</p> <p>Capacity to do it:</p> <p>Development Plan</p>
<p>Manager view:</p>		
<p>Aspirations:</p>		

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## *Activity: Talent Review*

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- Print and post the forms for each leader on the wall.
- Start with the leadership team:
  - o Each leader explains where they are, their expectations, goals, and development needs.
  - o Have open conversation around each leader and their spot in the organization.
- Once leadership reviews are complete, review each employee
  - o Manager shares the slide
  - o Other leaders share their thoughts
  - o Goal: There is an agreed upon plan for each employee

# CLOSE THE MEETING

Goal: Wrap the meeting up, with everyone on the same page and all actions assigned.

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*Activity: Close the meeting & follow-up*

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- Review the past two days
  - 10 year vision
  - Vision & mission statements
  - 3-year target
  - Core values
  - 1-year vision
  - 90-Day Plan
  - Problems solved
  - Issues
    - Review open issues and determine priority. Assign ownership and schedule problem solving session for high-priority issues
  - Parking Lot: Assign or remove items on the parking lot
  - To-dos: Review all to-dos add assignments and due dates

Thank everyone for coming

Share notes and any other follow-up materials within 2 days!

**Implement your plan: Don't file it on the shelf, It needs to be the cornerstone of you weekly leadership meetings!**