Presenter,

Welcome to:

Strategic Planning for the Rest of Us

Presented by
Lighthouse Consulting Services, LLC

Featured Guest:
Brian Oken
Informal Cowboy
310-466-2804
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Host:
Dana Borowka, MA
CEO, Lighthouse Consulting Services, LLC
Author of Cracking The Personality Code
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What's On A CEO's Mind?

- Executive team
- Operations
- More sales

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Let's Start!

“A goal without a plan is only a dream”

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Our Purpose

- Our Purpose is to help companies:
  - create great workplace environments with highly engaged, productive employees
  - achieve superior financial results - better than industry averages

- The best tool we know of to make this happen is a strategic plan

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Stop trying to do everything!

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What's the Difference Between Strategic Planning and a Strategic Plan?

- A Strategic Plan is a written document that helps you manage your people and priorities for better results.

- Strategic planning is a defined process you go through to vet all the strategies and directions you could possibly consider for your company and decide on the best approach to achieve your over-riding goals.

- What you should end up with is a simple to understand plan that guides decisions, assigns personal responsibility, keeps people informed of progress and the company on track.
Why is a Strategic Plan so Important?

- Lead purposefully and with strategic intention
- Increases your chances of actually achieving your goals
- Focus your efforts on customers and margins
- Keeps your team on track
- Reminds you when to say ‘no’
- People feel they are on a journey together

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Why is a Strategic Plan so Important? (cont.)

- Achieve greater than industry average financial results
- Establishes or grows relevancy to your customers
- HOW the company will get to where it wants to be
- Connects company goals with daily activities

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Step 1: Discovery

WHERE ARE YOU NOW?

- What do you want to achieve?
- Know your numbers!
- What have you done to date?
- Management team competency?
- Don’t skip the preparation work!

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Step 2: SWOT

- What the company does well
- What the company doesn't do well
- Where opportunities lie
- What could threaten our plans

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Step 3: Vision

WHERE ARE YOU GOING?

- Must be clear and easily understood
- Vision is a desired long term goal
- What picture comes to mind?
- Combination of purpose, long-term goal, ideal customer, what the company looks and feels like in the future.
- Communication with others
- Ensures everyone working toward one set of goals

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Step 4: Strategies
HOW ARE YOU GOING TO GET THERE?

- 1 or 2 per year
  - Only the most important
Step 5: Implementation

- Where plans fail
- Assign personal responsibility
- By when
- Measures
- Limited resources - choose wisely
- Celebrate!

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Step 6: Measurements

ARE YOU MAKING PROGRESS?

- Measurements are the score
- Establish milestones to gauge progress
- Communicate to your team!
  - Keep them engaged

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Step 7: Follow Up

- Planning is the easy part!
- Quarterly follow-ups a must
  - You will face unexpected obstacles
  - Note what’s working, realign what’s not
  - Personal responsibility - Is it getting done?
- Individual unit/department goals
- Two way meetings with managers
Additional Responsibilities of the Leader

- Present plan to company
  - Reinforce the vision and what's important

- Staff Meetings
  - Agenda

- Quarterly actuals vs. plan

- Celebrate successes!
  - Themes

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Why Do Strategic Plans Fail?

- Leader doesn't follow up
- Didn't do good preparation work
- Too many goals
- Chose wrong strategies
- Lack of commitment to vision

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Why Do Strategic Plans Fail? (cont.)

- Employees not aligned with leader
- Lack of personal responsibility
- Too many ideas, lack of discipline
- Looking for a quick fix
DIY or Bring in an Outsider?

- DIY
  - Save money
  - Distrust toward outside consultants
  - Company employee controls process

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DIY or Bring in an Outsider? (cont.)

- Outside Facilitator
  - Skill and knowledge transfer
  - Unbiased, untainted viewpoint
  - Tackles favoritism, double standards, personal agendas
  - Entire focus is to discover what is the best course of action for the company
  - Ensures follow up and personal responsibility

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Summary (cont.)

- Generates greater profitable sales growth
- Improves operational performance
- Creates a great workplace culture
- Bottom line - achieve your goals!

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Thank you for attending Strategic Planning for the Rest of Us

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