

SAMPLE MATERIAL

Success Planning: A 'How-to' Guide for Strategic Planning

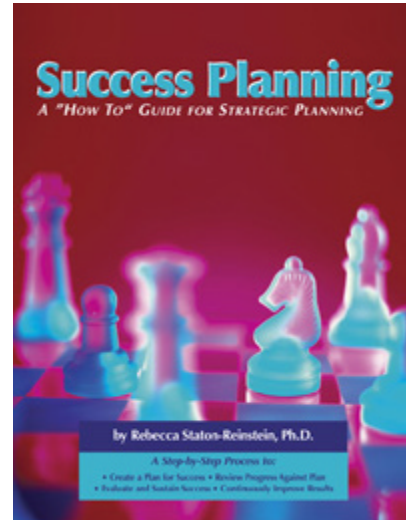


Table of Contents

Dedication	A. Create or Revisit the Vision
Acknowledgements	Steps to create a Vision
INTRODUCTION	Our Vision
Do's and Don'ts of Strategic Planning	B. Create or revisit the Mission
Using this Workbook Successfully	Steps to create the Mission
THE STRATEGIC PLANNING	Our Mission
PROCESS	Aligning Vision and Mission
Steps in Strategic Planning Process	Aligning Our Mission with next higher
I PREPARE FOR PLANNING	lever Mission
A. Perform Situational Analysis	C. Develop high level Goals
1. Determine data that you need for	Steps to create Goals
a thorough, useful analysis	III SET OBJECTIVES
2. Gather the data	A. Define desired outcomes for each
3. Determine data accuracy and	level
completeness	SMART Objectives
4. Analyze data	Steps to create Objectives
5. Create a summary report	Objective definition matrix
Data Analysis Results - Priority	B. Choose Strategies for each
information for planning	objective
B. Perform SWOT Analysis	Strategy Definition Matrix
Comparison Matrix:	Perform Risk Analysis
Strengths/Weaknesses	Review and accept the Objectives
Comparison Matrix:	IV CREATE THE STRATEGIC PLAN
Opportunities/Threats	A. Review Strategic Plan
C. Define Customer Expectations	B. Finalize Strategic Plan
Customer Surveys	Strategic Plan
Top of the head survey	V CREATE TACTICAL PLAN
Reflective survey	A. Define Tactics, Tasks or Activities
Key Customer Expectations	Steps to create Tactical Plan
Key Stakeholder Expectations	Tactical Plan
D. Perform "Brain Dump" of ideas and	B. Set responsibility, measurement,
desired activities	and targets
E. Collate Planning Considerations	C. Set up reviews
II SET DIRECTION	D. Publish the Plan

- E. Create Tactical Plan for each organizational level
 - The relation of Tactical Planning and Project Management
- VI CREATE THE BUDGET
 - A. Calculate Budget for each task
 - B. Estimate costs of alternative tasks
 - C. Create first draft
 - Steps to create a Budget
 - D. Cut Budgets Strategically
 - Steps to Cut the Budget
 - E. Finalize the Budget
- VII EXECUTE PLAN
- VIII MANAGE THE STRATEGIC AND TACTICAL PLANS
 - A. Review progress against Plan regularly
 - Status: Progress against Plan
 - Steps to manage the Strategic and Tactical Plans
 - B. Analyze deviation from Plan
 - C. Create revised Plan and Budget
 - D. Create new Tasks and Objectives
- IX ASSESS LESSONS LEARNED
- X ASSESS ALL PLAN RESULTS
- XI IMPROVE PLANNING PROCESS
- XII IMPLEMENTATION
 - CONSIDERATIONS
 - A. Create Planning Team
 - B. When to use facilitation
 - C. Choosing a facilitator
 - Determine your needs and their importance
 - Compare candidates to criteria
 - Improve vendor selection

Facilitator (Vendor) Selection Matrix
Steps in choosing a facilitator

TOOLS FOR STRATEGIC PLANNING

Multivoting
Forced Choice Matrix
Situational Analysis
SWOT ANALYSIS
Comparison Matrix:
Strengths/Weaknesses
Comparison Matrix:
Opportunities/Threats
Top-of-the-Head Customer Expectations
Reflective Customer Expectations
Expectation Questions Examples
Customer Expectations
Aligning Vision and Mission
Aligning Our Mission with next higher lever Mission
Goal Definition Matrix
Objective Setting Matrix
Strategy Selection Matrix
Strategic Plan
Tactical Plan
Budget Planning Matrix
Status Reporting: Progress Against Plan
Facilitator (Vendor) Selection Matrix
Risk Analysis Matrix
REFERENCES
INDEX
About the Author