



Destination Postcard

End of year planning

Presented by Alistair Green





**STRATEGIC
PLANNING
PROCESS 101**

WHY IS STRATEGIC PLANNING IMPORTANT?

We believe:

***To win in business today, you'll need a plan...
A plan your team knows and can implement.***



STRATEGY

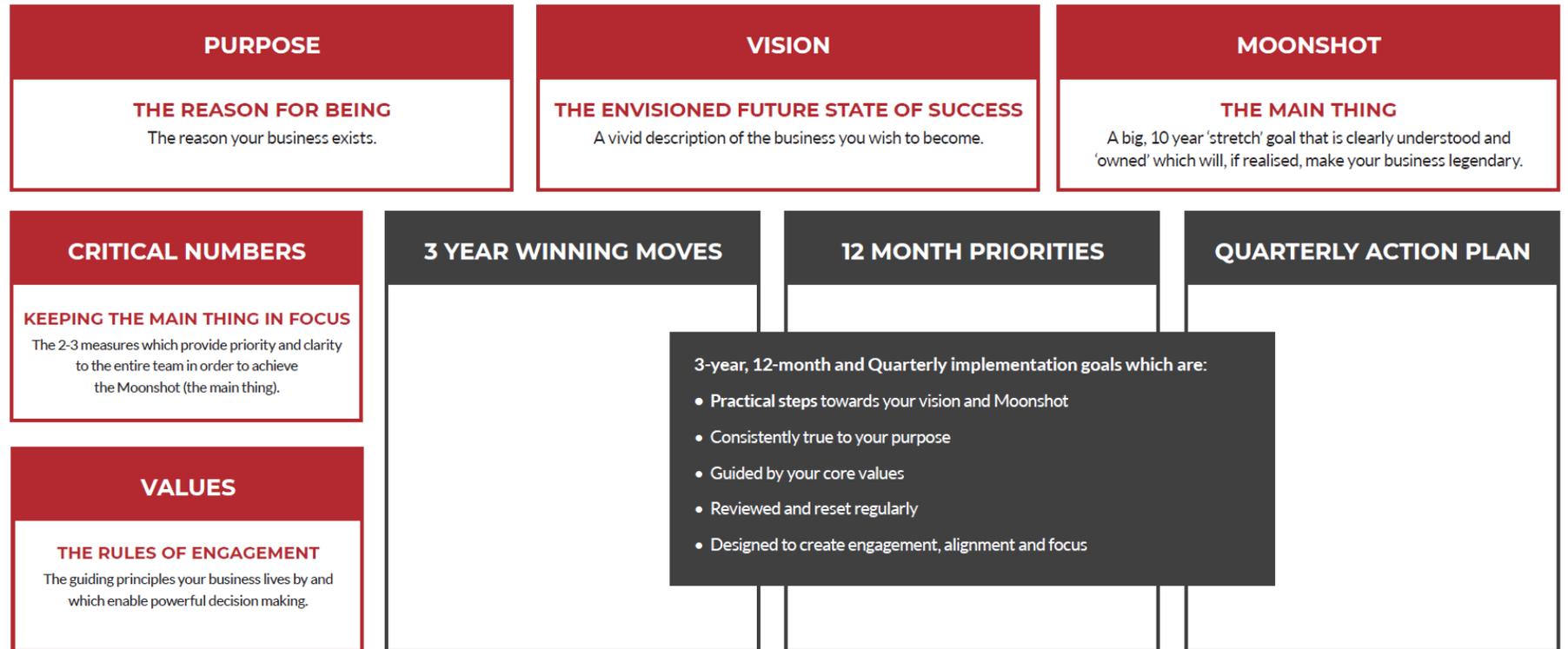


*The main thing is to
keep the main thing the
main thing.*

STEPHEN COVEY

THE ONE-PAGE STRATEGIC PLAN (OPSP)

The OPSP has been adopted from Verne Harnish's work



SWOTT





THE 10 CORE ELEMENTS OF STRATEGIC PLANNING

1. External environmental scan
 2. Gather feedback
 3. Directors set the vision
 4. Involving the right people
 5. Two-day offsite retreat
 6. Document the plan
 7. Allocate project leaders for accountability
 8. Make it visual
 9. Check-ins
 10. A strategic cadence
- 

1. EXTERNAL SCAN

If the ladder is not leaning against the right wall, every step we take just gets us to the wrong place faster.

~ Stephen Covey

1. EXTERNAL SCAN

Macro Environmental Analysis

Understanding your environment and how you compare to your peers

Tools / Actions:

- Industry reports
- Competitor analysis
- Accounting insights
- A lot of publicly available information to use
- PESTEL, PEST or DEPEST

TIP: Find a non-competing company that most closely resembles you and learn from each other



2. FEEDBACK

It takes humility to seek feedback. And it takes wisdom to understand it, analyze it and appropriately act on it.

~ Stephen Covey

2. FEEDBACK

Gather feedback from those who know your business and seek diverse points of view

Tools / Actions:

Anonymous survey:

- Employees
- Suppliers
- Clients / customers
- Trusted advisors
- Peers

TIP: Feedback is not a to-do-list, but it does require analysis, action and good communication.

2. FEEDBACK

Questions (10-12):

- Start
- Stop
- Keep
- Strengths
- Weaknesses
- Opportunities
- Threats
- Trends
- What would we do differently if we started from scratch
- What decisions would you make if you were Director for a day

3. DIRECTORS SET THE FUNDAMENTALS

Good leaders set the vision, missions, and goals. When everyone is united in purpose, a positive purpose that serves not only the organization but also, the world beyond it, you have a winning team.

~ Colin Powell

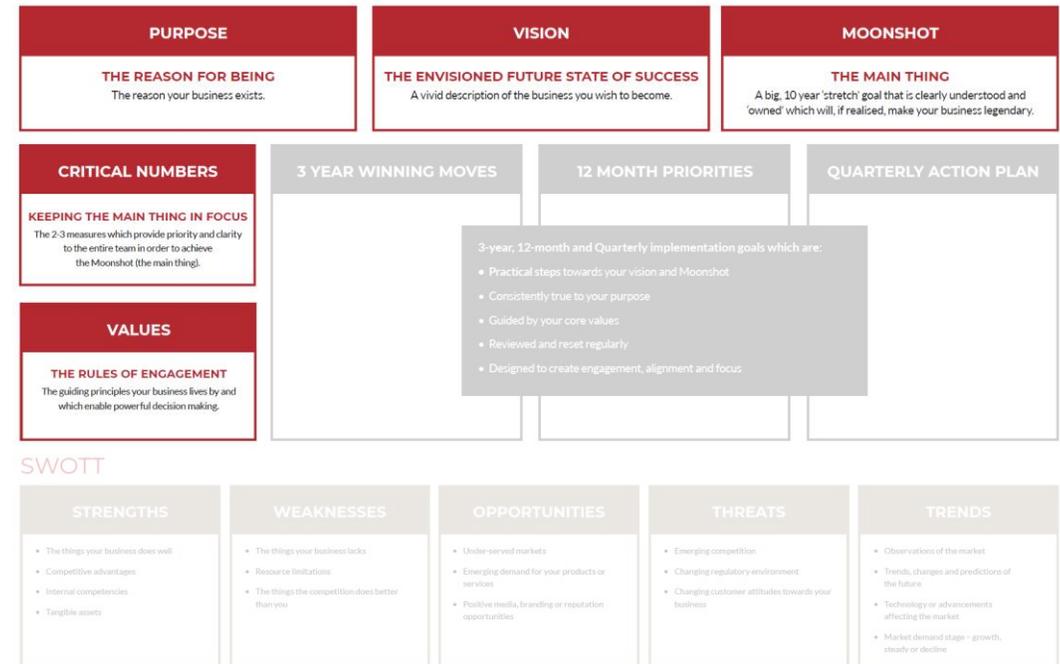


3. DIRECTORS SET THE FUNDAMENTALS

Your people need direction first: Purpose, Vision, Values and Moonshot (if known)

Tools / Actions:

- Complete the Red section of the OPSP
- CEO Presentation



TIP: No-one has ever told be that they are tired of hearing the back-story to their company.



4. INVOLVE THE RIGHT PEOPLE

If you want to go fast, go alone. But if you want to go far, go together.

~ African proverb



4. INVOLVE THE RIGHT PEOPLE

Tools / Actions:

1. **Invite** the right people
2. Provide them the preparation work (steps 1-3) and ask them to **Review** the data
3. **Quarantine** non-strategic ideas
 - (a) Operational list;
 - (b) Green-Light list; and
 - (c) An Ideas-Bench for the future

TIP: You can invite emerging leaders to this, recognising their potential and offering them a valuable reward.



5. TWO-DAY OFFSITE

Strategic planning is not about predicting the future; it's about creating it.

~ Peter Drucker

THE BEACH, THE BUSH OR THE MOUNTAINS



5. TWO-DAY OFFSITE

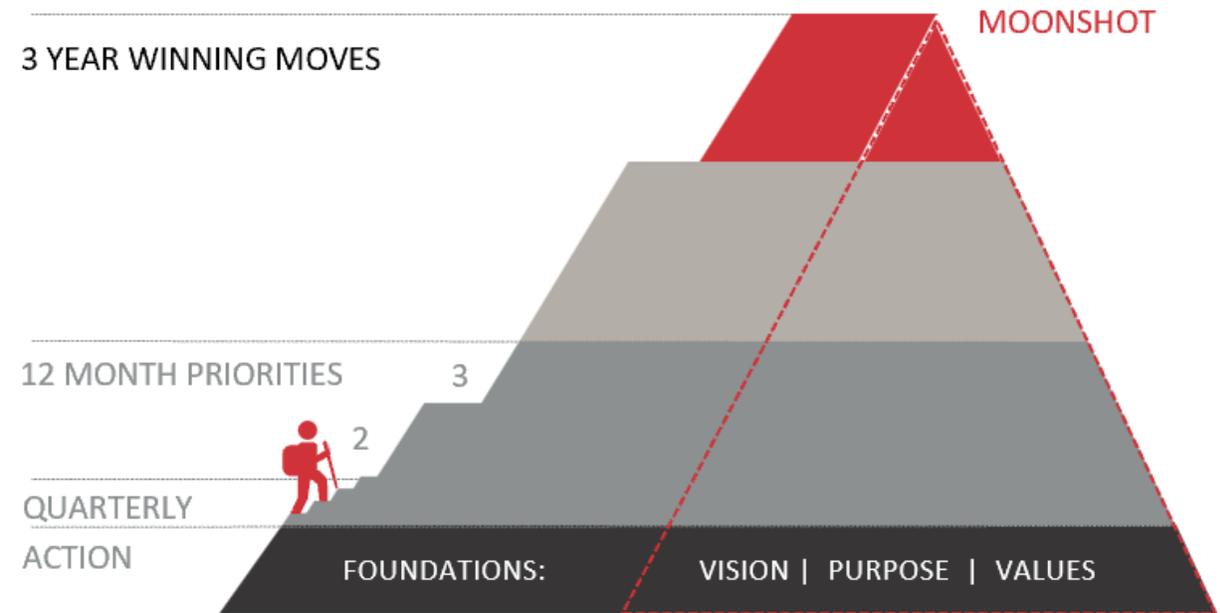
Two days together, offsite in a non-operational setting. Somewhere different with some space to think, grow and learn together.

Tools / Actions:

Day 1 – The TEAM : Team activity, personal development, high-level strategy

Day 2 – The PLAN : Work through the plan

TIP: Do not rush this incredibly important time together.



6. DOCUMENT THE PLAN

*A dream written down with a date becomes a goal.
A goal broken into actionable steps becomes a plan.*

~ Greg S. Reid

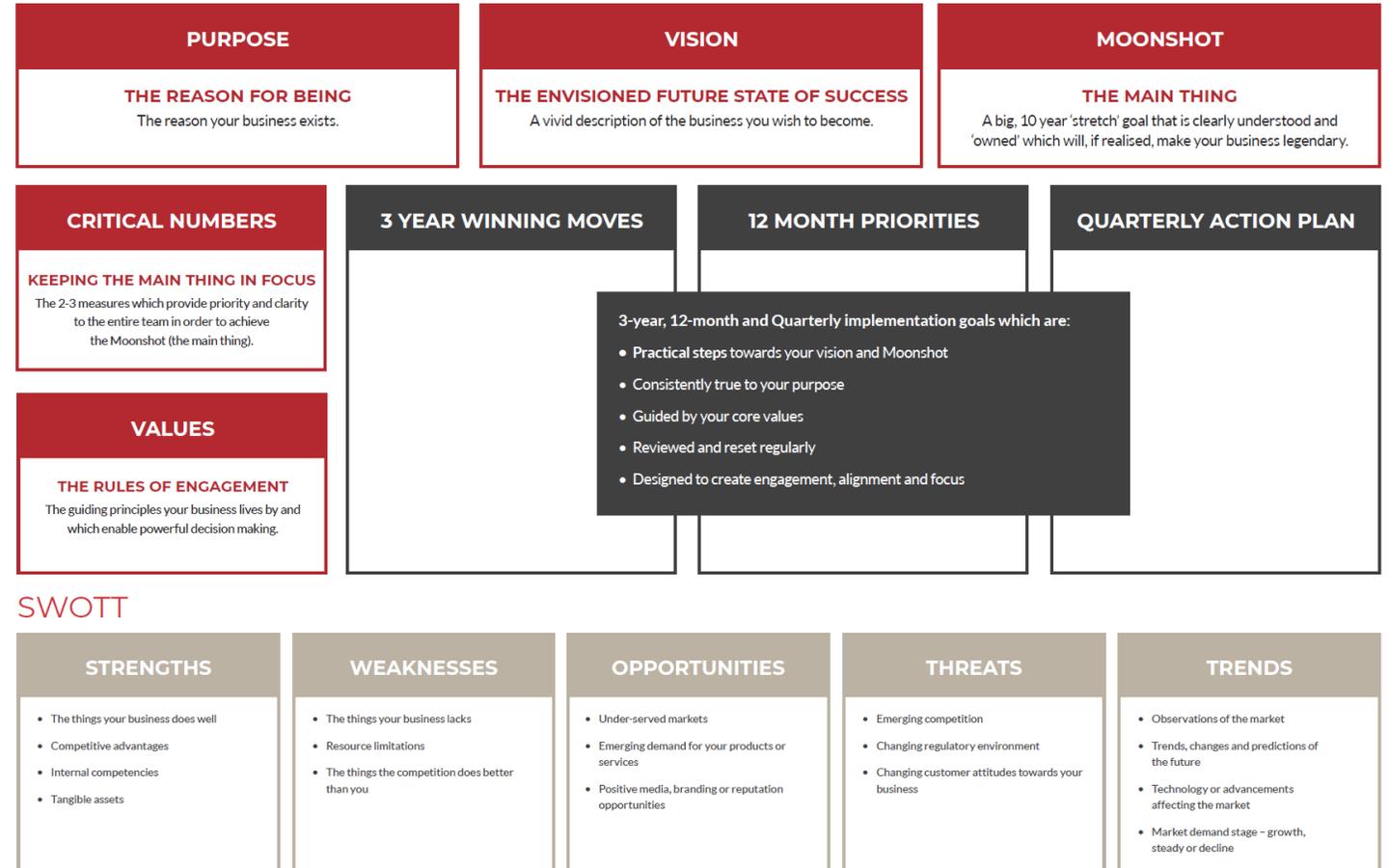
6. DOCUMENT THE PLAN

Get it down, then get it right

Tools / Actions:

One Page Strategic Plan (OPSP)

TIP: You have to put pen to paper!



7. ALLOCATE PROJECT LEADERS

Responsibility equals accountability equals ownership. And a sense of ownership is the most powerful weapon a team or organization can have.”

~ Pat Summitt

7. ALLOCATE PROJECT LEADERS

Failure to implement (FTI) is the greatest killer of strategic planning

Tools / Actions:

For each 12 Month Priority and Quarterly action:

- Put the initials of the project leaders in square brackets []
- Provide 2 weeks after to complete a detailed Project Plan

TIP: Single point of accountability only

WHAT, WHEN [WHO]

8. MAKE IT VISUAL

No plan survives first contact with the enemy.

~ "Helmuth von Moltke"



8. MAKE IT VISUAL

You must take strategy back into the workplace and give it life

Tools / Actions:

- Townhall meeting
- Print and publish
- Leaders must commit – do not change the plan lightly
- Fight the status quo
- **Repeat yourself, a lot!**

TIP: Embed strategy into your business – talk to Marketing, HR, IT and Operations



BRAND PROMISE

Straight talk | Practical options | Real results

You are in good hands. We know our space.
What we do, we do with excellence.
What we don't do, we'll get, outsource,
or refer to a partner.



PURPOSE

To have a positive impact through
our **Better Way** formula.
 $I \times [K+H+B] = EPTC$

VISION

To achieve mastery of our space by
having a position on all things:
People | Leadership | Strategy

VALUES

We understand
the role we need
to play (and are
willing to play it)

We approach
all things with
heart and
balance

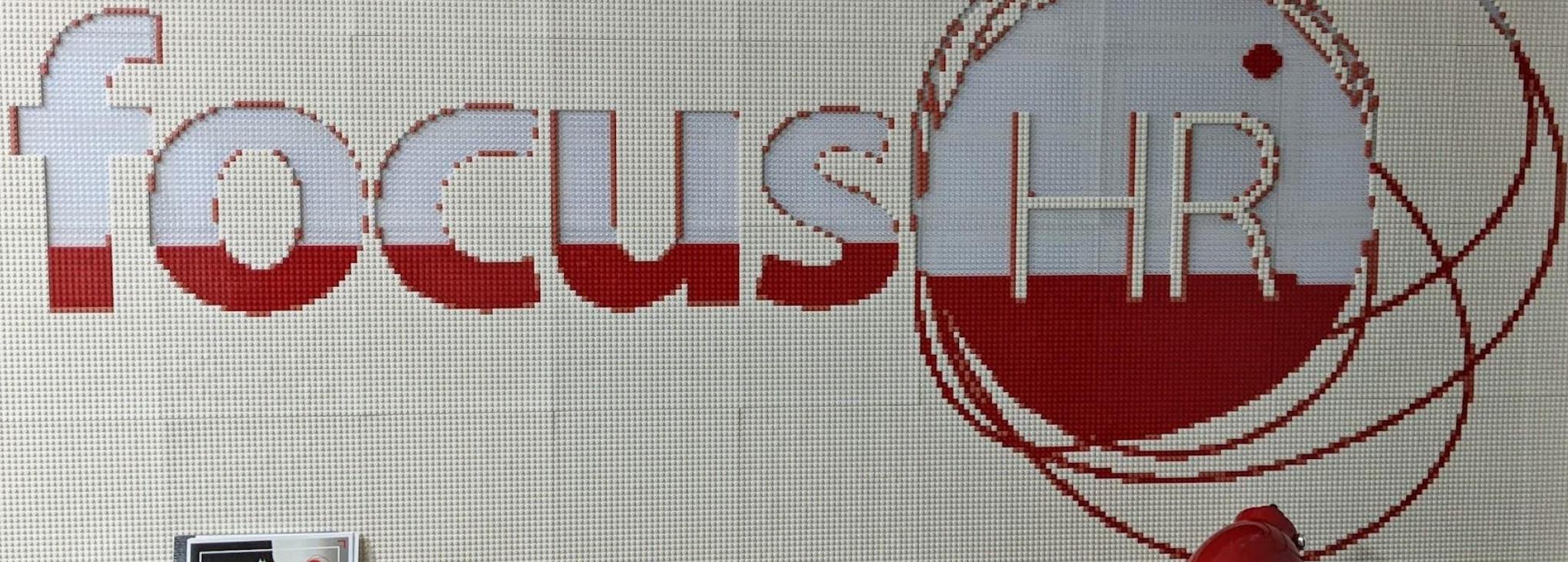
We will only
be part of
stories we are
proud to tell

Work and fun
in equal
measure

We do our best,
until we know
better and then
we do better

We share
the journey

**MOONSHOT: HAVE A POSITIVE IMPACT ON THE
WORKING LIVES OF 100,000 PEOPLE BY 2030**



9. STRATEGY AND PROJECT CHECK-INS

There is nothing quite so useless as doing with great efficiency and effort, something that should not be done at all

~ Peter Drucker

9. STRATEGY AND PROJECT CHECK-INS

We revert to type very easily, check-ins will prevent FTI.

Tools / Actions:

- Set monthly strategic priority check-ins
- No surprises – set times and agendas
- Your role as the leader is to clear the roadblocks (and don't become one)

TIP: If you recognise that you are the one most likely to introduce changes, give your team permission to say no.

Two simple questions:

1. Show me how you are going
2. What's getting in your way?

10. A STRATEGIC CADENCE

There's no single defining action, no grand program, no single killer innovation, no solitary lucky break, no miracle moment. Rather, it feels like turning a giant, heavy flywheel.

~ Jim Collins

10. A STRATEGIC CADENCE

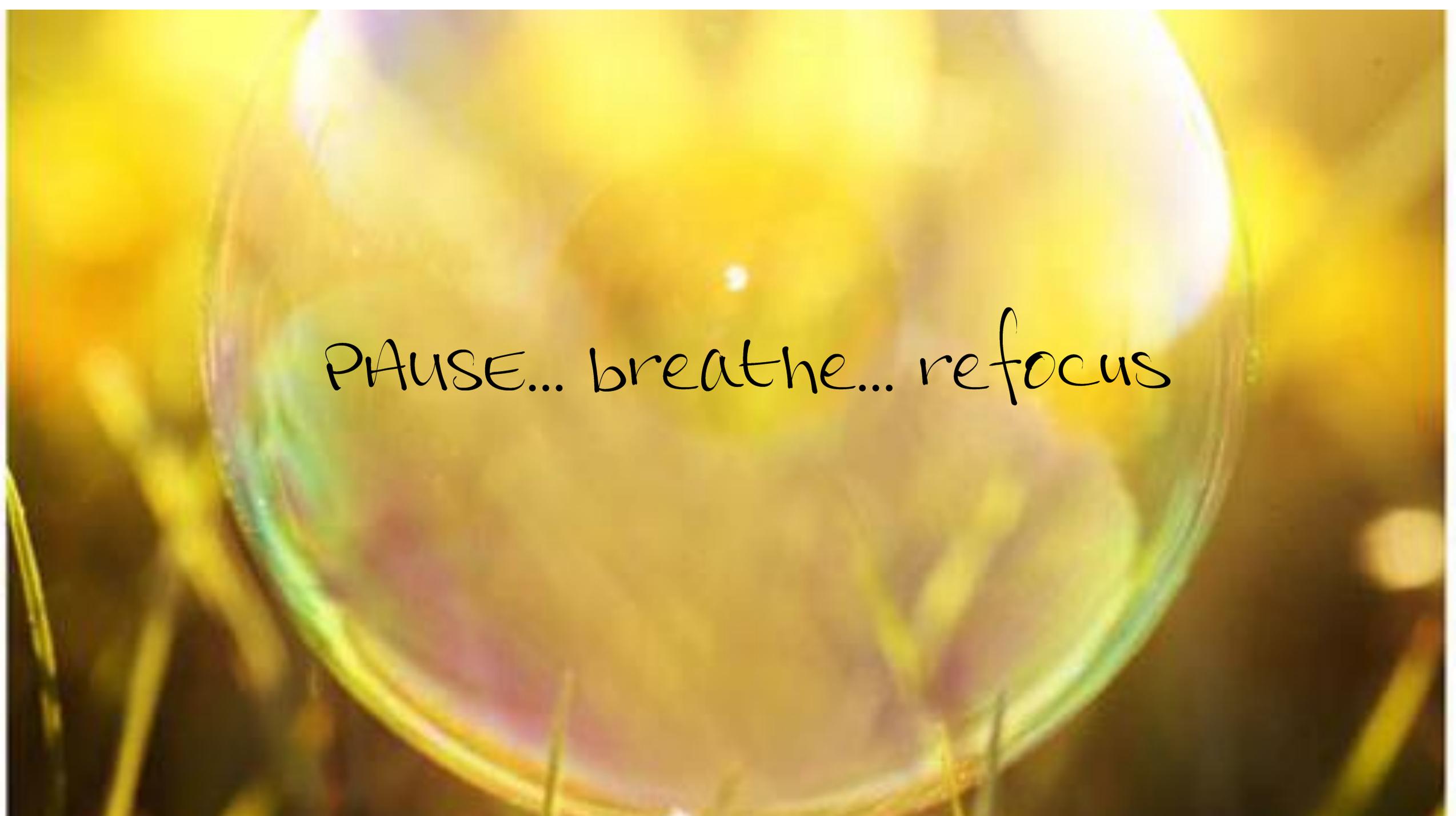
Rhythm, cadence, repetitions.

Do not let strategy become an event. This is leadership development, organisational learning, and discipline forming.

Tools / Actions:

- Communications Rhythm templates
 - Annual Retreats
 - Quarterly Review and Re-sets
 - Monthly check-ins
 - Weekly Operational Management Meeting
 - Daily Huddles

The Annual Strategy Meeting
The Quarterly Review & Reset
The Monthly Check-in
The Weekly Operational
The Daily Huddle



PAUSE... breathe... refocus

ACTIVITY - ENVISION A GREAT YEAR

DESTINATION POSTCARD

- What does success look like?
- What 3 things must happen to achieve this?
- Bring in the other ideas and link to big picture
- Discuss, debate and document



*A vivid picture of the near-term future that shows
what could be possible
~ Switch*

Next Steps



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upcoming events:**

23RD & 24TH FEBRUARY 20223

Group Strategic Planning
Workshop



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QUESTIONS?

