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# Section 1

Strategic Planning Template

#### Pre-Planning Questions to Consider

Who is this plan for?

What roles and responsibilities should be defined prior to the planning session?

Who will facilitate the Strategic Planning Process?

How much time should be allowed for the completion of this plan?

What resources should be available to support the planning process?

Where will the session be taking place?

Who will be responsible for being the scribe, crafting the content, and populating the template?

Who should review the draft, and draft revision?

How often will the progress be reviewed?

Who is responsible for measuring the progress?

#### Strategic Planning Questions to Discuss

#### **Step 1: Values**

1. Why are you in business?

2. What core values should be incorporated into all areas of business? Write down as many values as you can think of that are near and dear to your heart.

3.Once you have compiled a significant list of values, take the time to narrow the list of values listed above into "top 5" list below.

#### **Step 2: Mantra**

1. Who are you? In five words or less, describe what business you are in.

#### **Step 3: Vision Statement**

1. In one paragraph, create a verbal picture of what you would like your company to look like in years (Best to look 3-5 years out)

#### **Step 4: Mission Statement**

1. In one paragraph, dissect your Vision Statement into one third, and explain what will be accomplished within that timeframe.

#### Step 5: S.W.O.T. Analysis - Write one paragraph <u>each</u> that describes your strengths

Strengths-	<b>W</b> eaknesses-
Opportunities-	Threats-
• pporturneres	Timedata

### **Step 6: Critical Goals** — Write six to twelve goals that need to be accomplished to accomplish your Mission Statement, so that you are better prepared to reach your Vision. Remember to make these goals S.M.A.R.T.

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# Marketing and Sales Planning Template

#### Marketing and Sales Questions to Discuss

Before starting your Marketing and Sales Plan, decide whether your organization has Clients or Customers? Patients or Members?

We will treat our customers within our organization as \_\_\_\_\_\_.

Step 1	Clearly define the products or services that your organization provides:
Step 2	<b>:</b> Who is your target market?
	Geographic:
	Demographic:

Behavioristic:

Psychographic:

**Step 3:** How will your organization market to existing and new customers or clients?

**Step 4:** What is your unique selling proposition (USP)?

**Step 5:** What is your competitive edge? Why should a consumer pick you over your competition? How have you differentiated yourself from the competition?

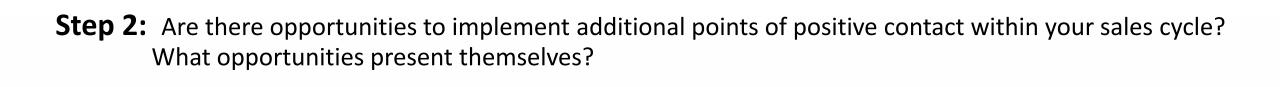
**Step 6:** How will your organization sell to existing and new customers and clients?



#### **Customer Care Questions to Discuss**

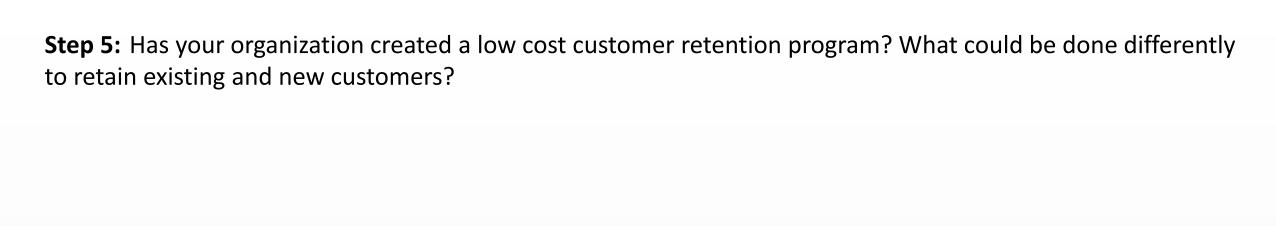
Our organization has \_\_\_\_\_\_! (Clients or Customers)

**Step 1:** What are the steps to the sales process within your organization? Create a chronological order from when a customer or client enters into the sales cycle and explain each step to the conclusion of the sales cycle.



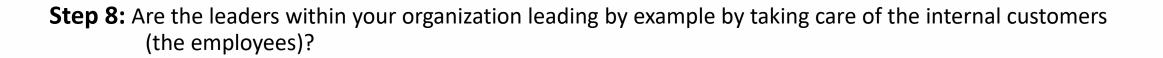
**Step 3:** Are your customers or clients *Raving Fans*? If not, what can be done to implement additional strategies to ensure their satisfaction? If so, what specifically is being done?

**Step 4:** Do you have a way to measure the current level of customer satisfaction? How? What could your organization add to measure it?



**Step 6:** How does your organization inspire existing customers or clients to refer their friends, family, and acquaintances to your company? What could be added bolster referrals?

**Step 7:** Has your organization created specific systems and procedures, as well as developed a training program for your employees on how to follow these procedures to create WOW! service to your consumers? When and how will this be done?



**Step 9:** How can you include everyone within your organization to take customer service seriously, in an effort to increase repeat sales and referrals to other potential buyers?

### Section 4

Financial and Profitability Planning Template

#### Financial and Profitability Questions to Discuss

**Step 1:** Does your organization have an accounting system that is up to date? Is it time to upgrade your version of your software program?

**Step 2:** Are the appropriate people in touch with the financial situation within the organization? Is there a process to review daily, weekly, monthly, or quarterly the Profit and Loss, Balance Sheet, Account Receivables & Payables, as well as the Cash Flow statements? How often do you meet with your financial advisors, accountants, and insurance agents?

**Step 3:** Does your organization have your policies on the financial management systems in writing? Including but not limited to yearly capital expenditures, budget, credit, collection, and invoice payment policies, and other policies that are pertinent to your business model? When will these systems be in writing and created as policy?

**Step 4:** What are the goals of your organization for the gross and net profits?

**Step 5:** What opportunities are available for the appropriate personnel to be current with bookkeeping and financial knowledge?

**Step 6:** Is your organization maximizing the benefits for all employees including management and owners personal financial gain through the business? Including cafeteria plans, health reimbursement accounts, 401k, and IRA's, etc.? What could be done differently to lower payroll taxes, personal taxes, and business liabilities?

## Section 5

Human Resource Planning Template

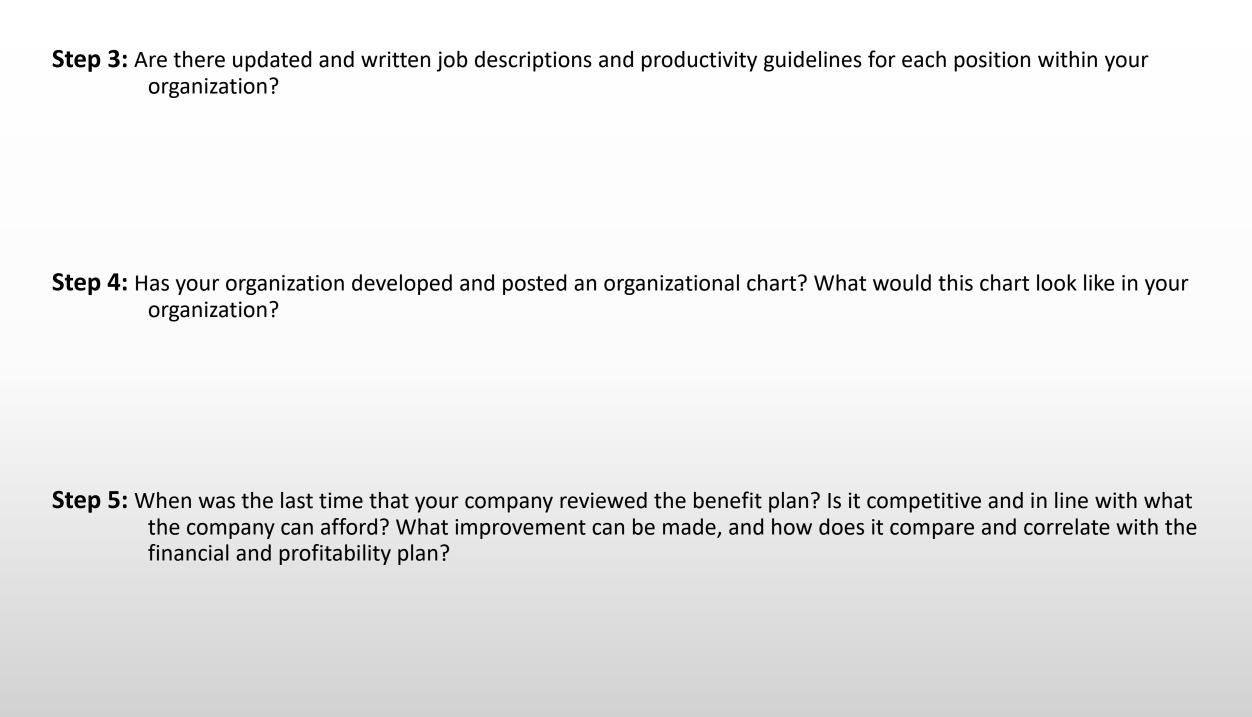
#### What Employees Really Want

1	Good Pay	5
2	Job Security	4
3	Promotion and Growth	6
4	Good Working Conditions	7
5	Interesting Work	1
6	Tactful Discipline	10
7	Loyalty to Employees	8
8	Full Appreciation of Work Done	2
9	Help with Personal Problems	9
10	Feeling of Being in on Things	3

#### Human Resource Questions to Discuss

**Step 1:** What is the cost of hiring and training a new employee within your organization?

**Step 2:** Does your organization have an appropriate human resource plan in place? Including policies and procedure manuals, and training manuals? Have they been updated?



**Step 6:** Is your organization giving the employees the training and development that they need and want to achieve their goals?

**Step 7:** While it has been proven to retain employees, increase awareness, and reduce the number of sick days taken, is your organization interested in creating a plan that promotes and improves the health and happiness of the employees?

## Section 6

Personal Development Program Template

#### Personal Development Questions to Reflect Upon

**Step 1:** Mental Development – How can you develop your mind, and what activities could you begin or continue doing?

**Step 2:** Physical Development – How can you develop your body, and what activities could you begin or continue doing?

**Step 3:** Social Development – How can you develop yourself socially, and what activities could you begin or continue doing?

**Step 4:** Financial Development – How can you improve your finances, and what activities could you begin or continue doing?

**Step 5:** Family Development – How can you spend more quality time with your family, and what activities could you begin or continue doing?

**Step 6:** Spiritual Development – How can you develop your mind, body, and spirit? What activities could you begin or continue doing?



### Developing a Sound Formal Code of Ethics Workbook Exercise

**Step 1:** Is it appropriate for your organization to develop a Code of Ethics? Is it for your employees, customers, vendors, or everyone that does business with you?

**Step 2:** What is important to address when developing your Code of Ethics? Why?

**Step 3:** After reflecting on the previous questions, start developing your Code of Ethics within this section? You may then test them against the eleven steps discussed previously as paraphrased from the text *Ethics in Human Communication* (Johannesen, 2002, pp. 180-182).

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#### Sample Business Plan Outline:

Executive Summary	Industry Overview	Operations	Summary
Business Concept	Industry overview	Workflow Summary	Summary
Business Model	Market drivers/ Factors	Operation Process	Expansion Opportunities
Market Need	Driving Demand	Operations Strategy	Keys to Success
Competition	Industry Trends	Management Summary	Funds Sought
Management	Size and Growth	Staffing Needs	Contact Information
Target Market/ Marketing	Buying Patterns	Management team	
Operations	Regulatory Issues	Advisory Board	Appendix
Funding Needs	Barriers to Entry	Organization Chart	
Exit Strategy	Maturity of Industry	Financials	
Company Background	Global Economic Factors	Sales Projections	
Company Description	SWOT Analysis	Income Statement	
Company Ownership	Target Market	Balance Sheet	
Key Management	Customer Groups	Cash Flow	
Trademarks, Copyright, and	Demographics	Capital Assets	
Other Intellectual Property	Psychographics	Break-even	
Company Location	Competition	Funding Need	
Company History	Competitive Positions/ Competitive Advantage Direct Competitors		
	Indirect Competitors		

Competitor Matrix



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