



Take Action Results

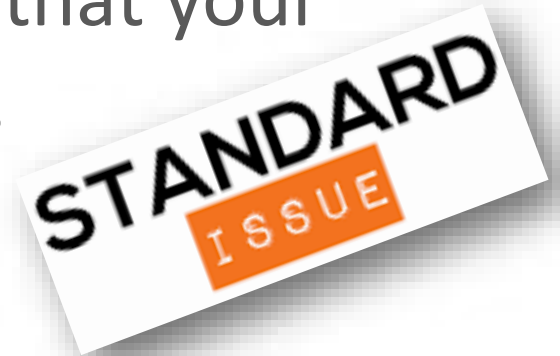
Profit! Freedom! Lifestyle!

Strategic Plan

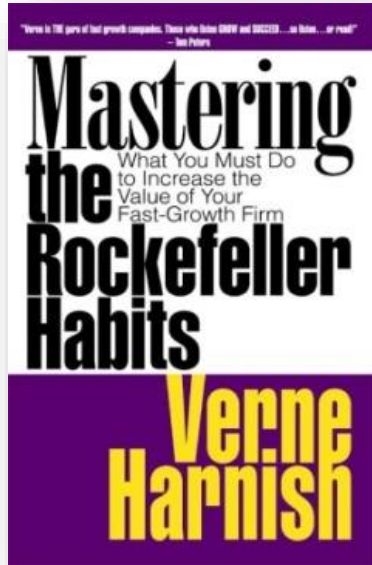
Strategic Plan



An evolving, written plan that sets forth the vision, mission, and values of your company, long and short range goals, and KPI's to measure progress so that your team moves together as one.



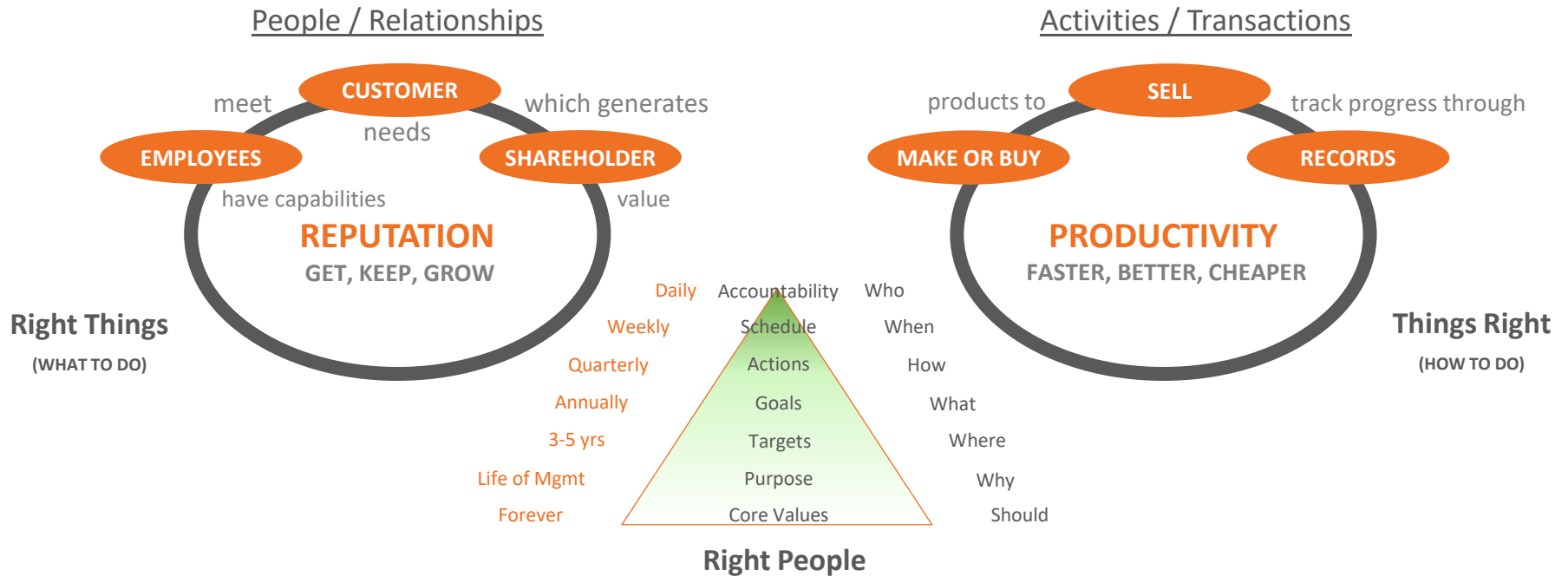
Formula for Winning



The RIGHT People
Doing The RIGHT Things
RIGHT!



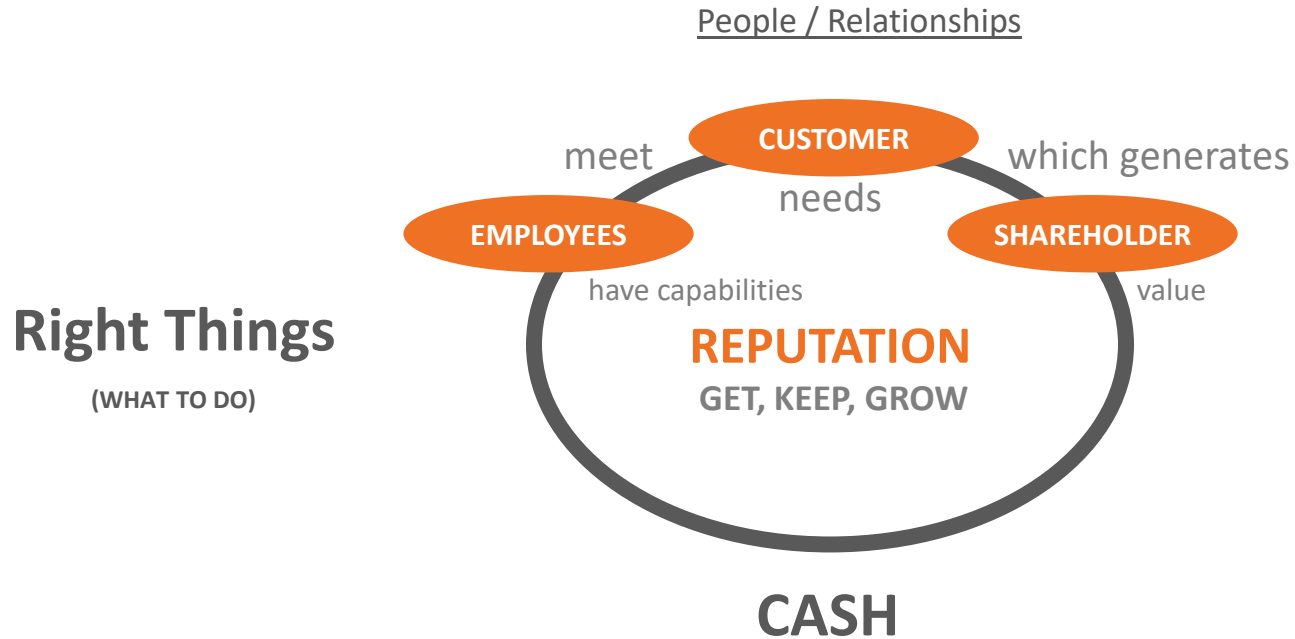
Right People – Right Things – Things Right



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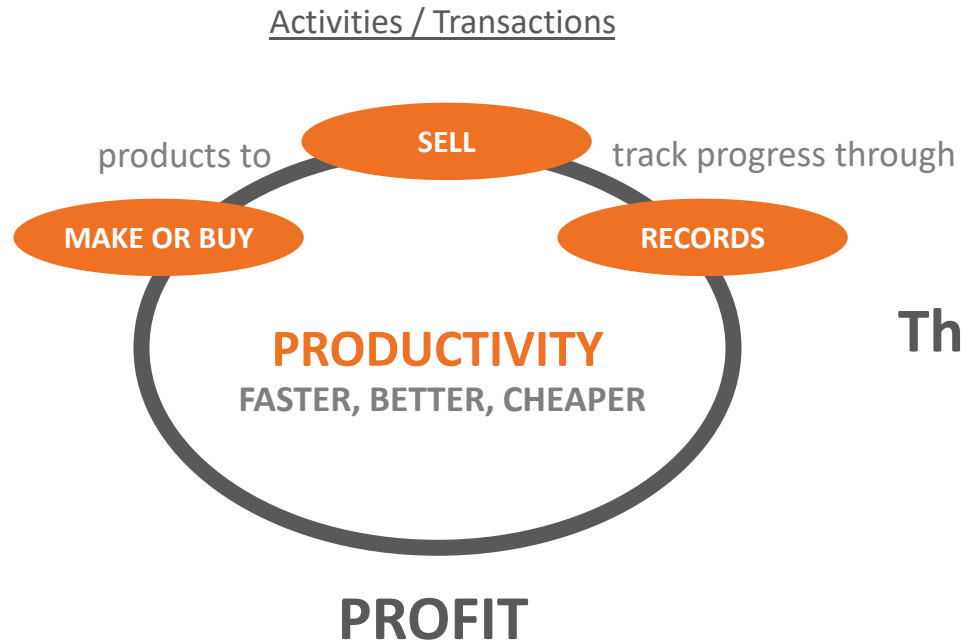
Right People – Right Things



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Right People – Things Right



Things Right
(HOW TO DO)

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Accountability Pyramid



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Keys to Successful Implementation

1%
VISION

99%
ALIGNMENT

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**“The art of progress is to preserve
order amid change and to
preserve change amid order.”**

- Alfred Lord Whitehead

1 Page Strategic Plan
Template

Strengths of Organization		Weaknesses of Organization		Opportunities to Exceed Plan		Threats to Making Plan		Trends to Watch	
1		1		1		1		1	
2		2		2		2		2	
3		3		3		3		3	
4		4		4		4		4	
5		5		5		5		5	

Core Values/Beliefs	Purpose (Why)	Targets (Where)	Goals (What)	Actions (How)	Theme	Baseline
Forever	10-30 Years	3-5 years	1 year (2008)	Quarter	Quarter / Year	Historical

Future Date	December 31, 2008
Revenues	
Gross Profit	
Net Income	
ROI	
Sandbox / Market	

Year Ending	December 31, 2008
Revenues	
COGS	
Gross Profit	
Fixed Costs	
EBITDA	
Net Income	

Quarter #	
Revenues	
COGS	
Gross Profit	
Fixed Costs	
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Net Income	

Deadline:	
Top KPI (Key Performance Indicator) for Year	
Annual Theme Name	
Q1 Theme Actions	

Quarter #	
Revenues	
COGS	
Gross Profit	
Fixed Costs	
EBITDA	
Net Income	

Actions	
1	
2	
3	
4	
5	

Key Thrusts/Capabilities	
1	
2	
3	
4	
5	

Key Initiatives	
1	
2	
3	
4	
5	

Rocks & Accountability	
1	
2	
3	
4	
5	

KPIs (Key Performance Indicators)

KPIs (Key Performance Indicators)

KPIs (Key Performance Indicators)

Scoreboard Design

Year Ending	2017-2018
Revenues	
COGS	
Gross Profit	
Fixed Costs	
EBITDA	
Net Income	

BHAG

g Hairy Audacious Goal

Brand Promise

Elevator Pitch

Celebration/Reward

--

Elements of the 1-Page Strategic Plan

1. **S.W.O.T. (& Trends)**
2. **Core Values/Beliefs**
3. **Purpose – BHAG**
4. **Targets – Thrusts/Capabilities**
5. **Goals – Initiatives**
6. **Actions – Rocks & Accountabilities**
7. **KPI's**
8. **Brand Promise, Elevator Pitch**
9. **Annual/Quarterly Theme**



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Team Life Cycle

F orming	Team is assembled. <i>Focus: awareness</i>
S torming	Reaction to teammates. <i>Focus: conflict</i>
N orming	Team blends together. <i>Focus: cohesion</i>
P erforming	Task is accomplished. <i>Focus: production</i>
D orming	Team is successful. <i>Focus: group-think</i>
A djourning	Team disbands. <i>Focus: bitter-sweet</i>

Team Life Cycle

Notes:

- Beware of the tendency to skip Storming and Norming
- Beware of and avoid the Dorming phase
- Changing membership initiates a new Storming phase
- Modifying variables: size, maturity, duration, task

1 Page Strategic Plan Template

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BHAG

g Hairy Audacious Goal

KPIs (Key Performance Indicators)

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Brand Promise

KPIs (Key Performance Indicators)

--

Elevator Pitch

KPIs (Key Performance Indicators)

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Scoreboard Design

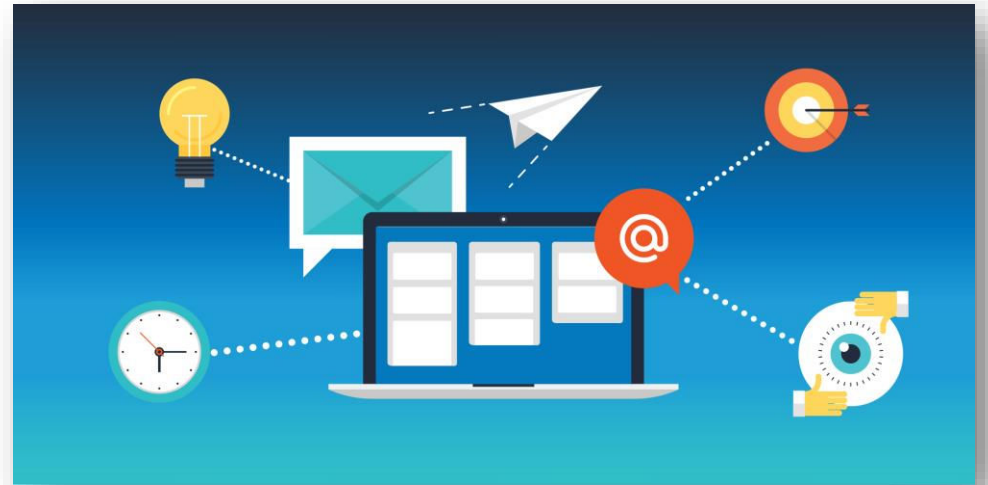
Celebration/Reward

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COGS	
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Net Income	

Workflow Management System (WMS)

Application software that “provides an infrastructure for the set-up, performance and monitoring of a defined sequence of tasks.



3 Classifications of Businesses



MAINSTREET
(SMALL BUSINESS)

less than \$10 million revenue



MIDDLE-MARKET

\$10 million - \$1 billion revenue



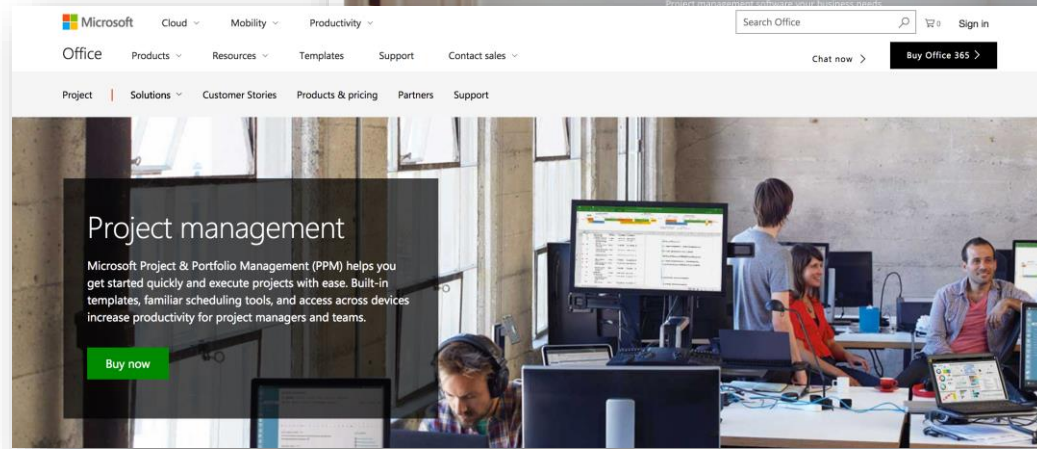
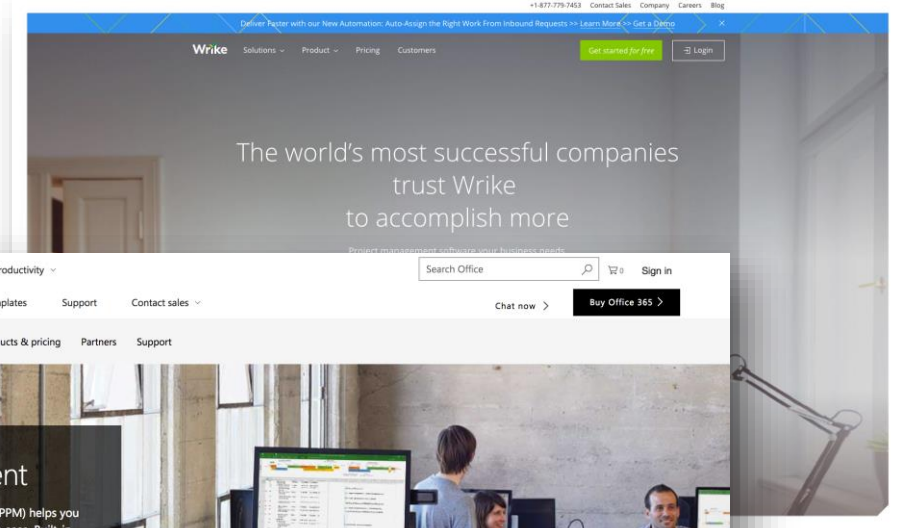
ENTERPRISE
(BIG BUSINESS)

over \$1 billion revenue

Definitions for these business classifications are not set, but many sources generally agree the numbers are somewhere in these ranges. Source: Investopedia.com

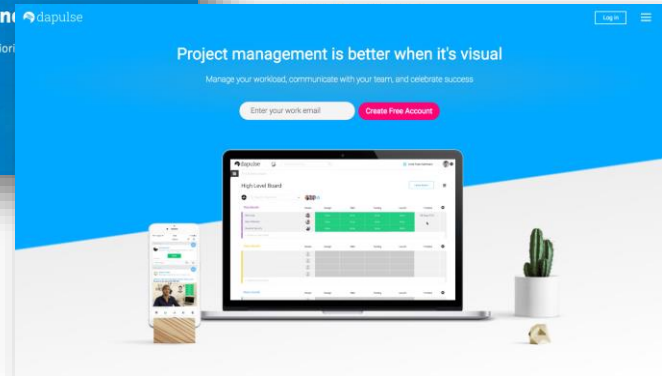
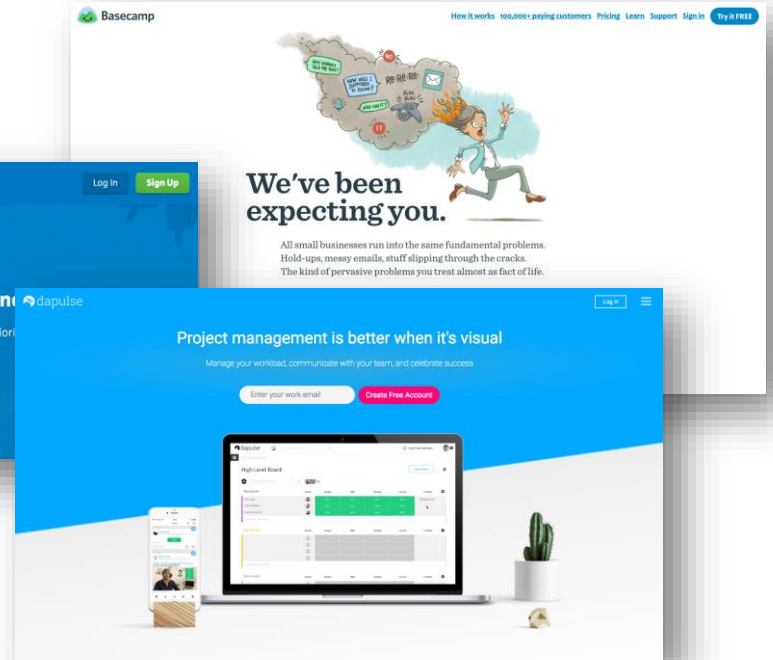
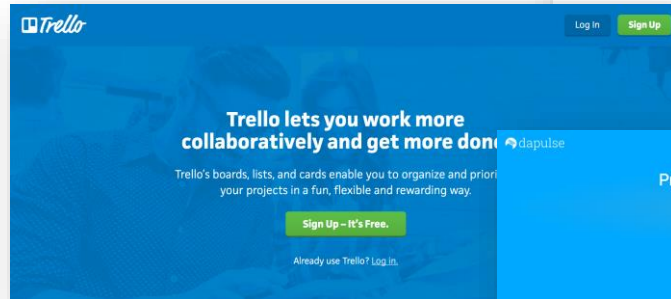
WMS for Big Business

- Wrike
- Microsoft Project



WMS for Main Street & Middle-Market Business

- Basecamp
- Trello
- Dapulse
- ClickUp



Verne Harnish's Books

