

THE DNA OF TURBOCHARGING YOUR BUSINESS

BY BILL BEAN

This presentation is designed to give you a "turbocharged" introduction to our powerful, proven business and performance optimization technology. As you experience the *DNA of Turbocharging Your Business* we will distill for you the "big picture" issues you and your team must face and master on the road to great strategic victories ahead of you. To help you negotiate the twists and turns of this high speed process, we will focus on pointing out the most important factors enabling you to capture the best predictable-growth opportunities for your company.

This first session is the first lap of a marathon—to provide your company a long-term strategic planning and implementation process. "Turbocharging" works if you remain relentlessly focused after your good start herein.

Strategia

Phone: 760-787-0900 • Fax: 760-787-0999

Ten Principles Of Strategic Planning

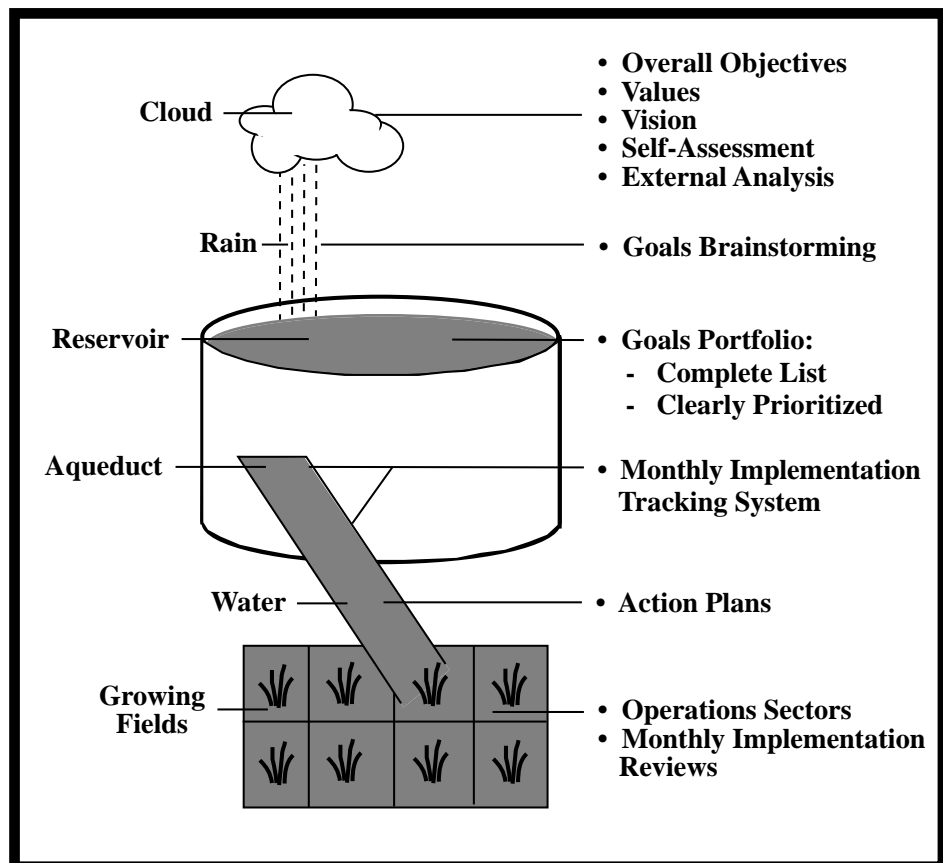
Performance Optimization Governing Concepts

The following are guiding principles as objectives to be achieved through this process as delineated in seven individual graphical exhibits: 1) the overall *analogy* for this strategic planning process; 2) the *leveraged results* of strategic planning; 3) the proven power of *monthly implementation*, 4) sharpening your turning radius to achieve *accurate speed*; 5) *alignment* of the rights for brilliant *communications*; 6) addressing the *lowest slat factors* which drain your company's overall potential, 7) the *major strategic optimization stages*, 8) the action-essence of strategic planning: "*plan*" and "*do*," 9) the *criticality of completeness* for proper leadership focus, and 10) the careful *orchestration* of your resources *in implementation*.

Principle One: Process Analogy

This graphic shows how Strategia's planning and implementation process can be likened to the "clouds-to-fields" process of nature's own growth cycle:

THE GOAL:
Convergence!

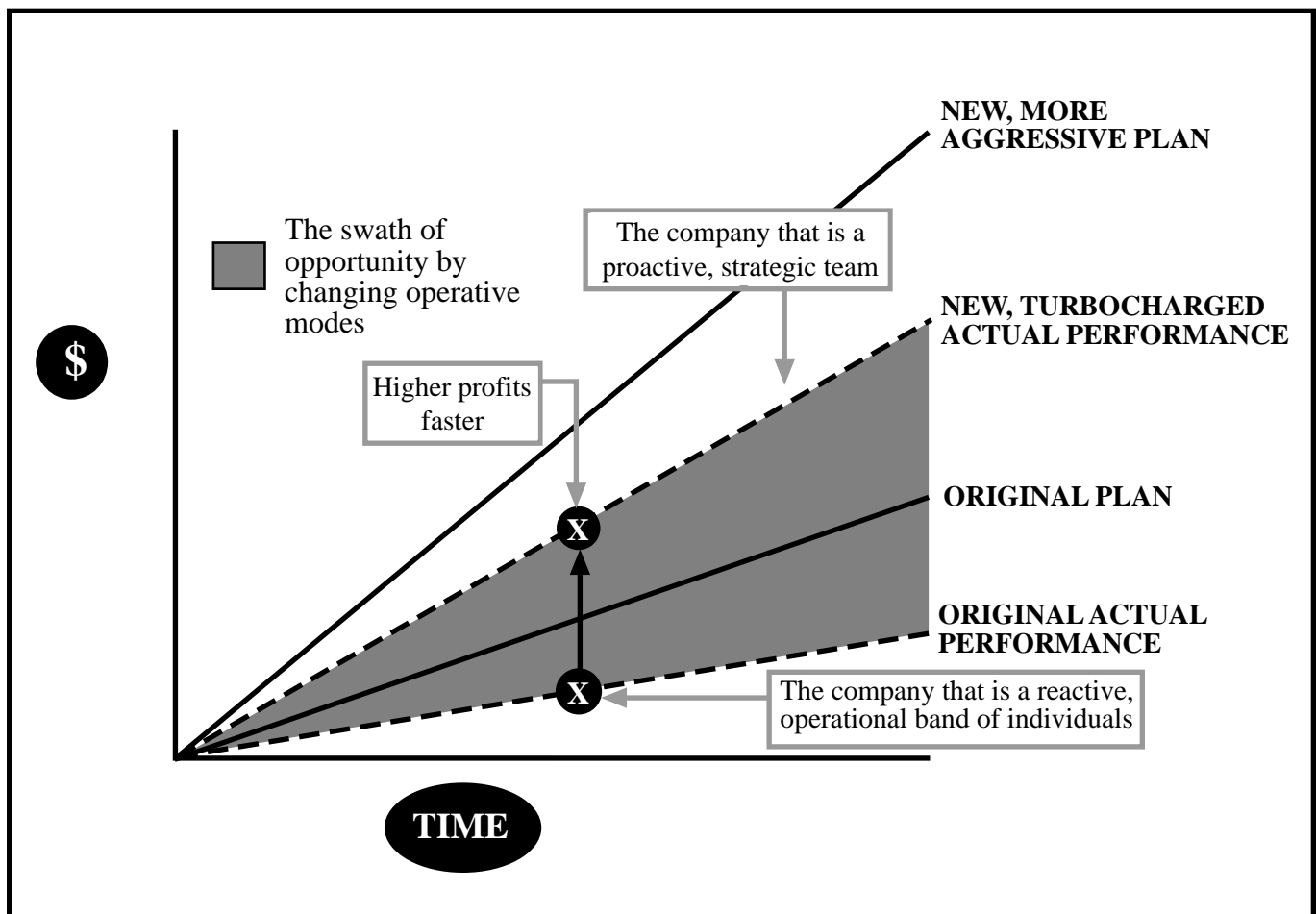


Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Two: Strategic Leverage

This graphic shows the leverage gained by a company shifting its mode from a reactive, individualistic operation to a proactive, team-synergized, strategy-driven entity (Strategia's clients have proven this "before and after" growth acceleration again and again wherein their new "actual" beats their old "plan".):



THE GOAL: Acceleration!

Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Three: The Data Concerning The Power of Monthly Implementation:

This graphic shows that there is a fourfold productivity/compression factor to be gained by installing an aggressive monthly tracking system:

	Annual Planning, Implemented Sporadically	Complete Planning, Implemented Monthly
# Goals Set	10	10
# Months	12	6
# of Goals Done	$\frac{3.5}{10}$	$\frac{7}{10}$
	Status Quo Results: Twice As Long . . . Half As Much	Turbo-Results: Half As Long . . . Twice As Much
	4:1 "Impact Ratio"	

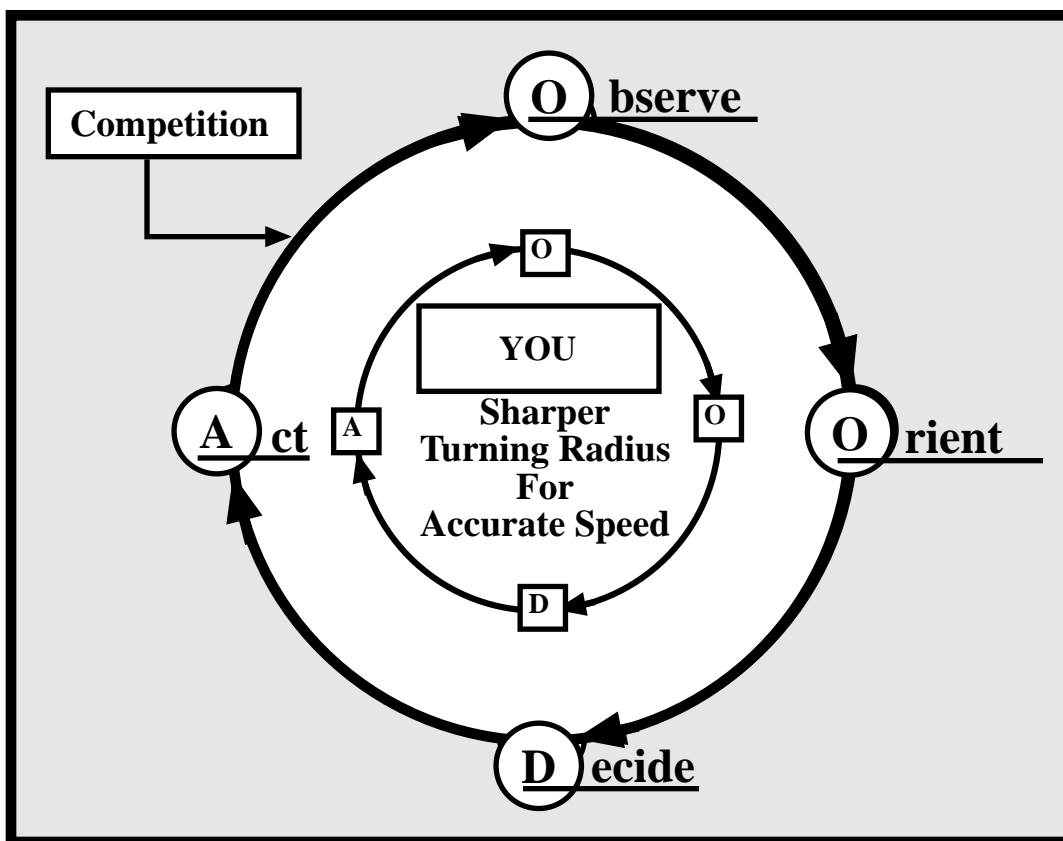
THE GOAL: *Compression!*

Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Four: Accurate Speed

This graphic shows that "accurate speed" is achieved by performing what Col. John Boyd (Marines) calls the O-O-D-A Loop faster than others, gaining the benefit of sharper turning radius—even allowing you more trial and error—ultimately giving you the competitive edge.



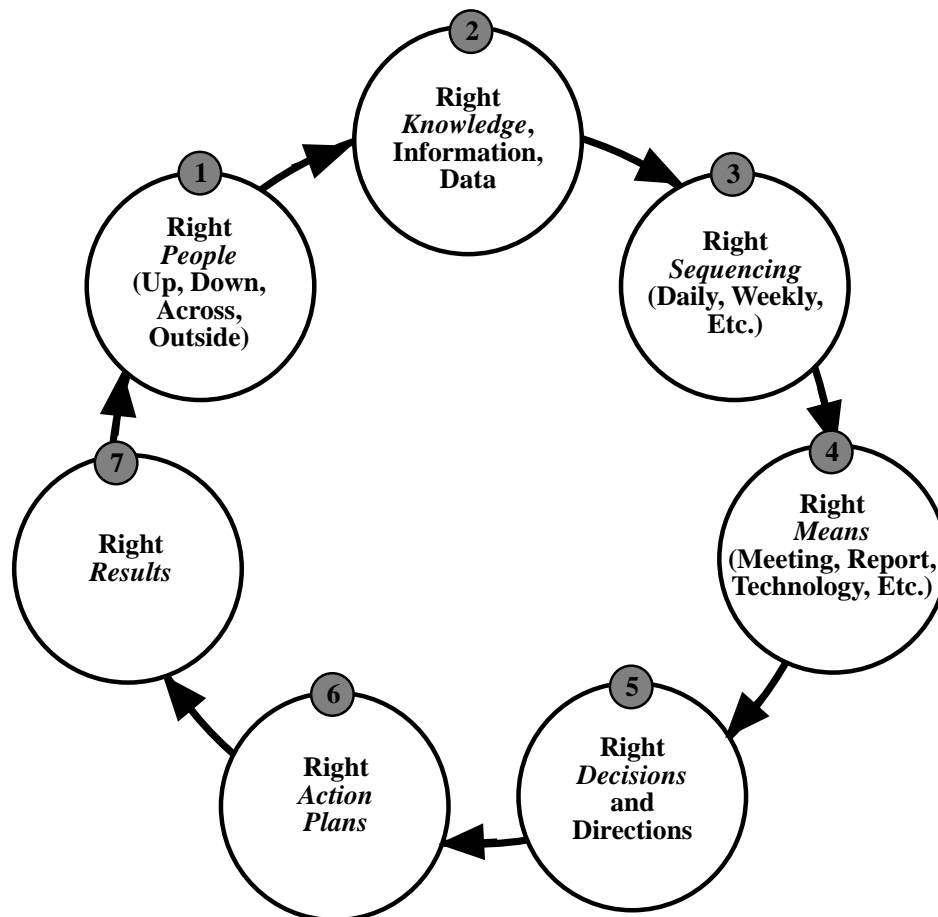
THE GOAL: Accurate Speed! (Not "ready/fire/aim" but ready/aim/fire/faster!)

Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Five: True Communication—Alignment of the Rights

This graphic depicts that communication, in its essence, not something so indistinct and ephemeral, but rather is the right *people* utilizing the right *information* in the right *manner*, ultimately *producing the right results*:



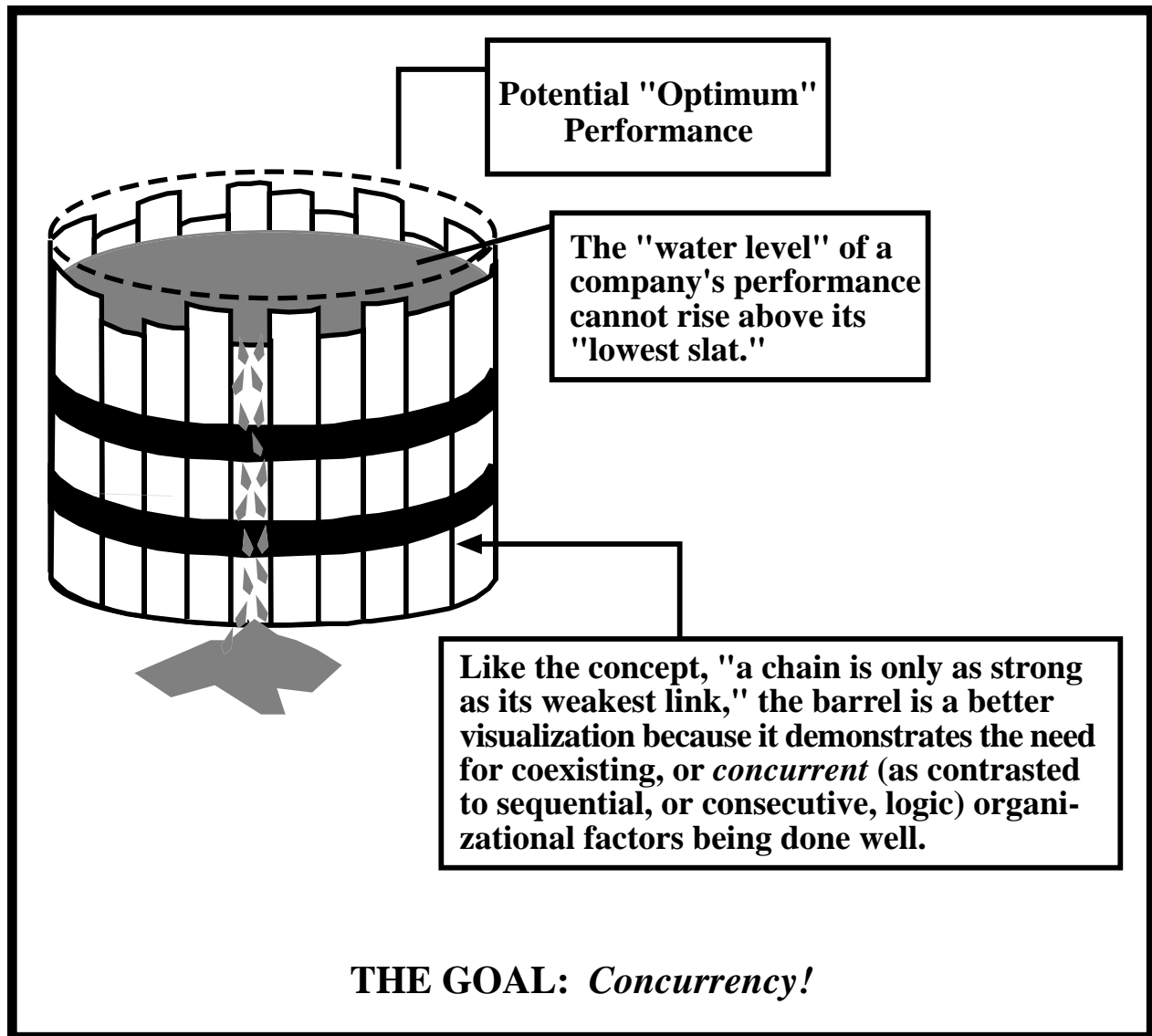
THE GOAL: *Alignment!*

Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Six: The "Lowest Slat" Factor

This graphic shows the criticality of concurrently reviewing the key aspects of your business in order to identify and raise the poorest performing factor, or "the lowest slat in the barrel" of your company. Otherwise, your company's potential is wasted.

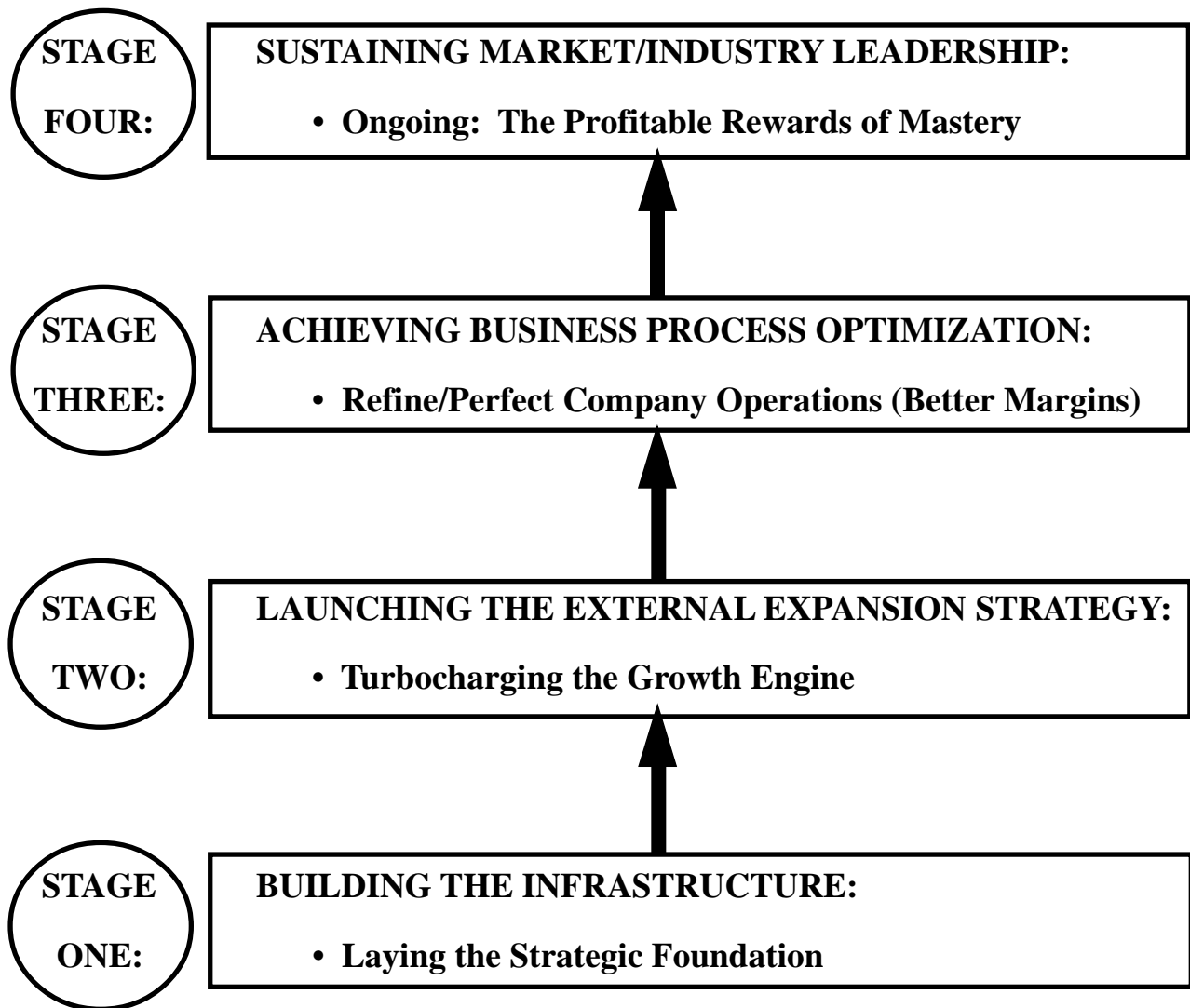


Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Seven: The Major Strategic Optimization Stages

While not mutually-exclusive time-wise, these four stages are general stages, or capability benchmarks, for companies systematically working toward optimization over several years:



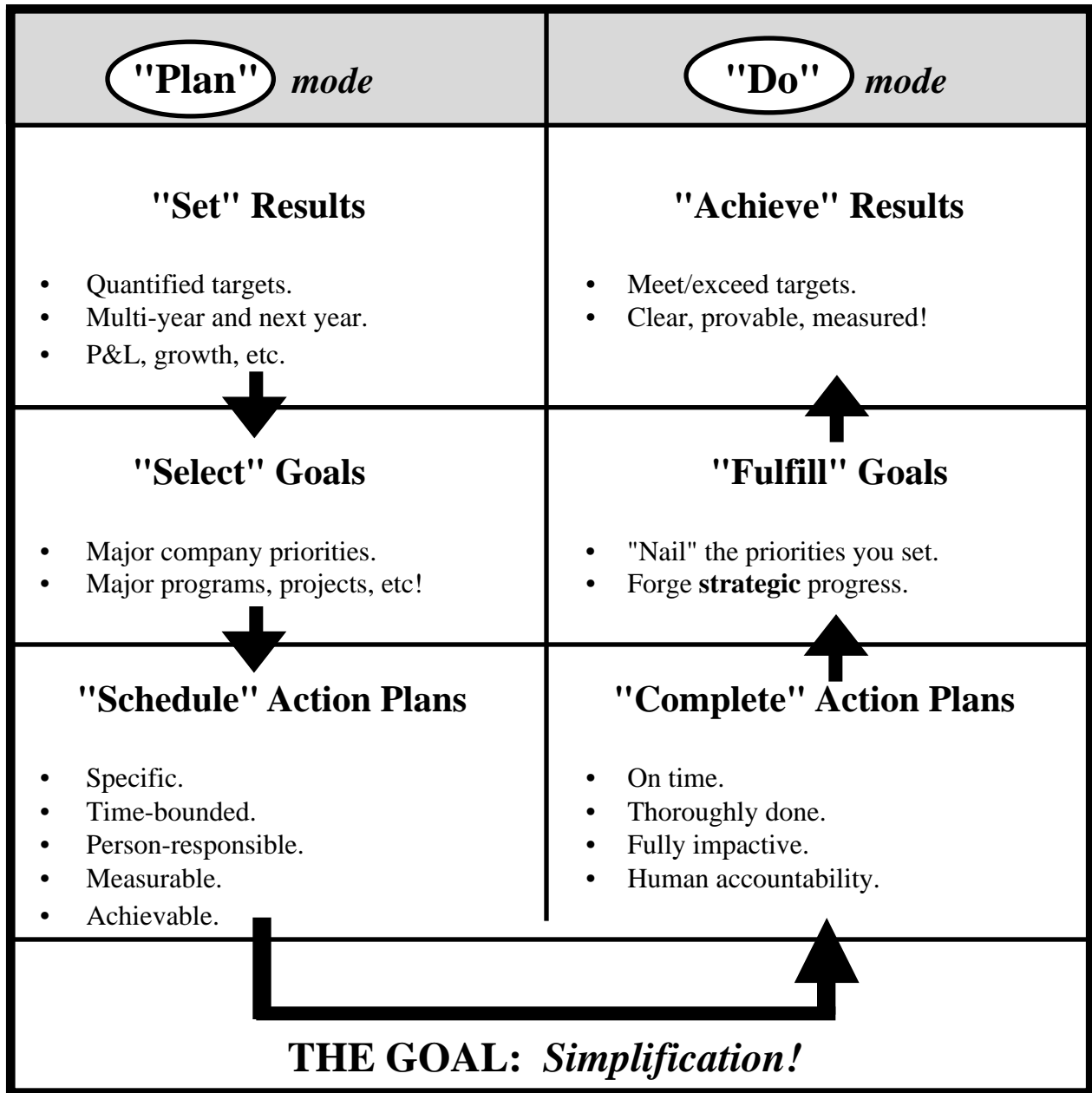
THE GOAL: *Sustainable Superiority!*

Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Eight: Strategic Planning Is PLAN and DO

In its essence, effective strategic planning is not "rocket science": it has three stages of plans in two modes.



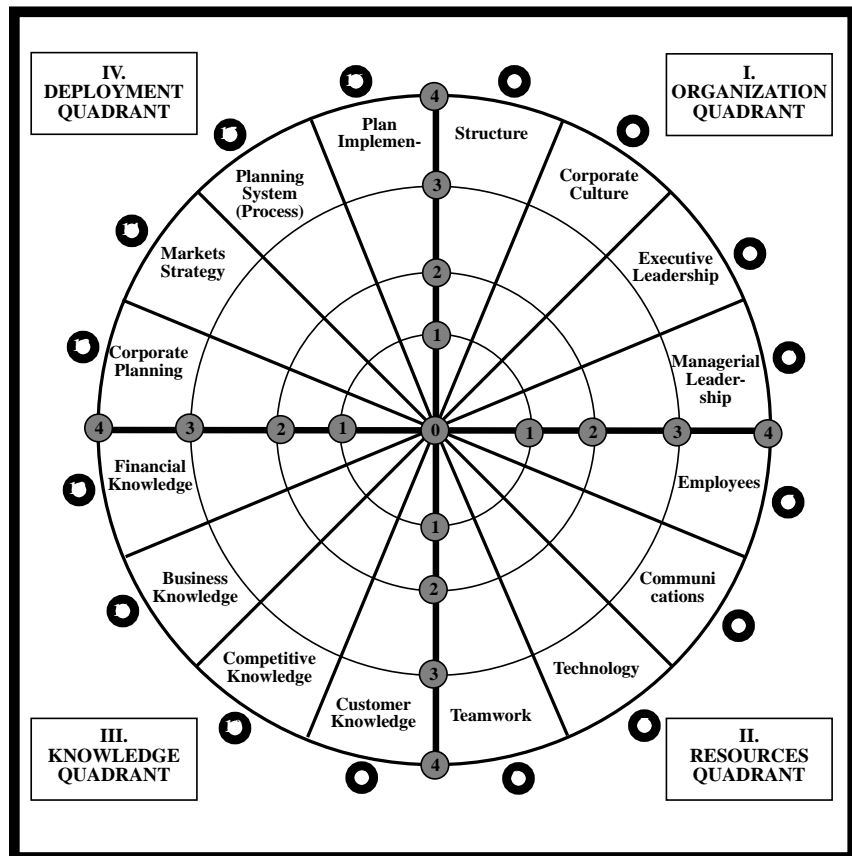
Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Nine: The Criticality of Completeness

Yes, focus is needed — always needed. But many times in the "name" of focusing in, leaders and their teams make the mistake of overcompensating. They limit themselves to "2 or 3" goals, and that undoubtedly helps focus. But there's a **much** better way: allocating the **right** amount of **resources** at the **right time** in the **right priorities**. The following 16 categories need your review as a **complete** assessment and "radar screen." Then, with a fully informed view, you can allocate "ergs" of energy to best strategic use.

A leadership team can evaluate each category of the company in terms of how well it is doing from "0" (F) to "4" (A). These categories can be reviewed every six to twelve months.



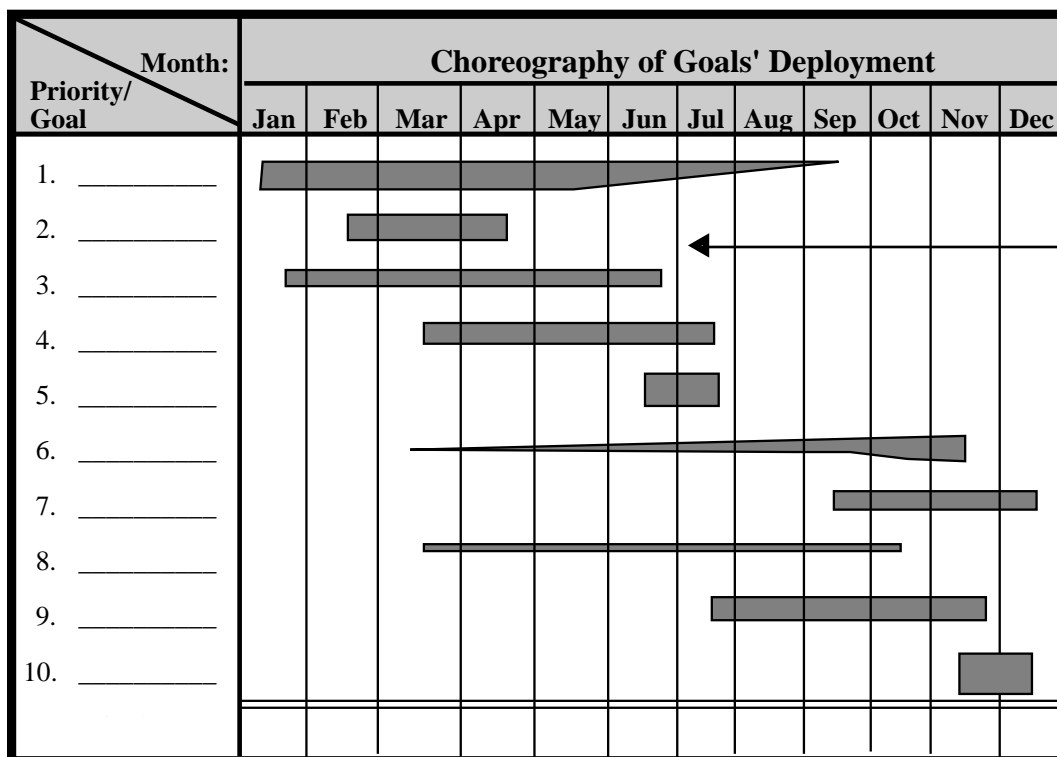
THE GOAL: *Completeness!*

Nine Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Principle Ten: **Orchestrating Your Goal Portfolio's Implementation:**

Your company may have 10 goals, but they have different priorities, start-times, durations, and people working on them (amounts of resources). A leadership team has **3 levers** it must pull in the right combination to synchronize implementation of its company's goals: 1) *the priority* you give to a goal relative to the others; 2) *the month* in which you choose to start work on that goal and its logical/necessary *duration* until completion, and 3) the amount of (density of) *resources* you choose to allocate to each goal at any given time. An example of a portfolio of goals executed over a year via allocated resources is shown below:



These blocks show the amount of resources (height of blocks: e.g., number of people assigned, etc.) and duration (width of blocks) of the project.

THE GOAL: *Deployment!*

Ten Principles Of Strategic Planning (continued)

Performance Optimization Governing Concepts (continued)

Keys: 12 Governing Elements

This graphic provides 12 keys that truly drive the optimization of all organizations.

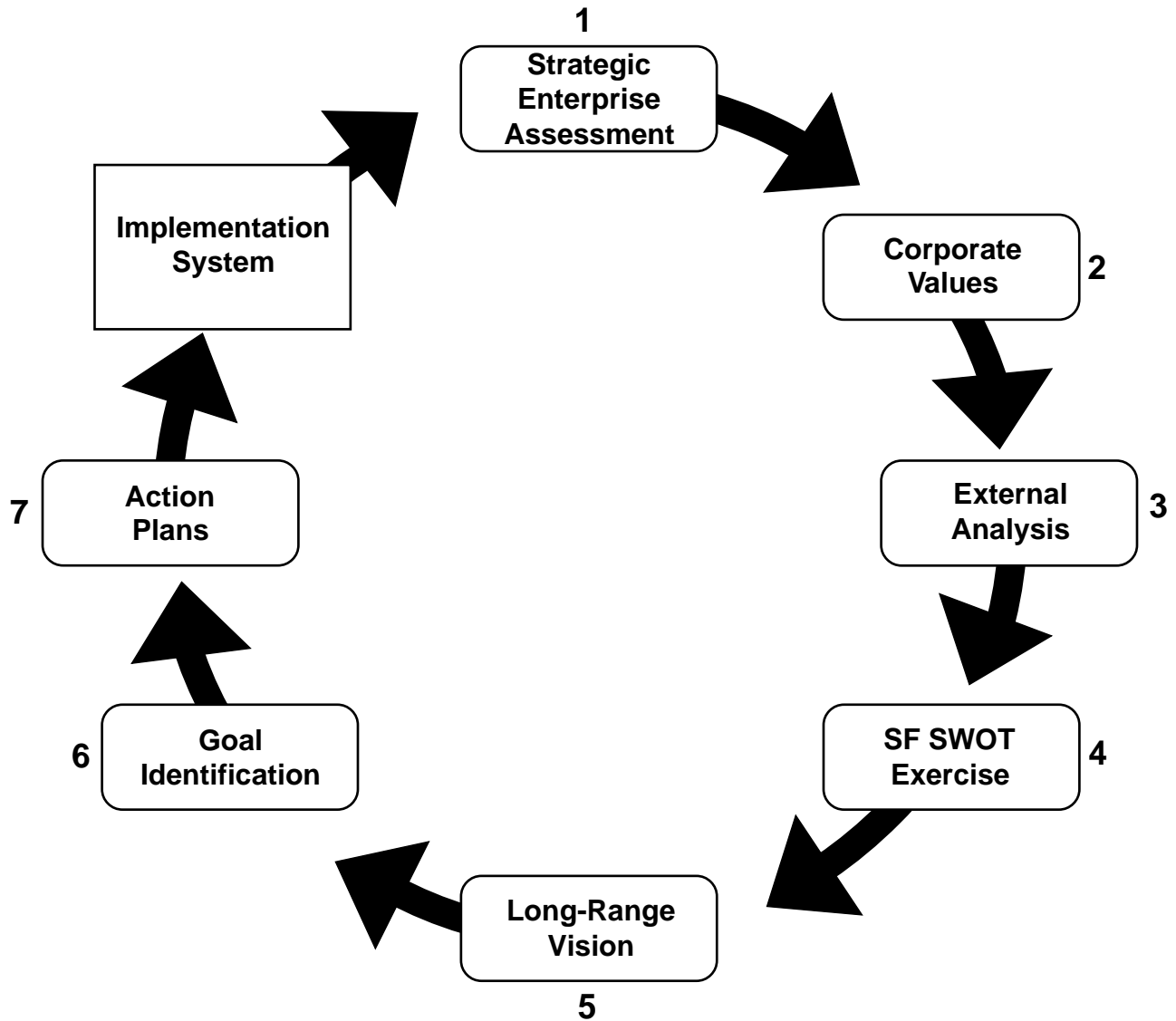
TWELVE GOVERNING ELEMENTS SUMMARY:

"Keys for achieving corporate optimization with common sense and discipline as gleaned from 170 companies in 65 industries"

<p>Key 1 COMMON SENSE</p> <p>[Critical] This is absolutely the transcendent need of all leaders and companies today.</p>	<p>Key 7 PURSUE: "ACCURATE SPEED"</p> <p>Utilize an adaptable, repetitive OODA Loop process: 1) Orient 2) Observe 3) Decide 4) Act</p>
<p>Key 2 COMPLETENESS</p> <p>[Critical] You need to make and maintain a thorough review of <i>all</i> key areas.</p>	<p>Key 8 BE: PERFORMANCE-DRIVEN</p> <p>Accelerate the <i>rate</i> and <i>timing</i> of your business results.</p>
<p>Key 3 CONCURRENT</p> <p>[Critical] <i>Not</i> serial, sequential steps, but choreographed, orchestrated plans, all in right proportion.</p>	<p>Key 9 VALUES- AND VISION-GOVERNED</p> <p>Determine your beliefs and direction, then "walk your talk" every day in every way.</p>
<p>Key 4 IMPLEMENTATION</p> <p>[Critical] Once you've planned your work you must work your plan via specific, time-bounded, person responsible action plans.</p>	<p>Key 10 THE MASTER PROCESS</p> <ol style="list-style-type: none">1. Develop a portfolio of goals.2. Prioritize them.3. Develop action plans.4. Do them!
<p>Key 5 KILL FADISM</p> <p>Absolutely avoid "du jour" thinking and the latest, cute approaches like the plague!</p>	<p>Key 11 THE MASTER PRACTICE</p> <p>The Master Key to planning success is the Monthly Implementation meeting: 1) Key Indicators; 2) 2-Minute Drills; 3) Action Plans Review; 4) New-News Closure.</p>
<p>Key 6 AVOID 3 WHITE KNIVES</p> <ol style="list-style-type: none">1. <i>Ego</i> is the mismanagement of self.2. <i>Politics</i> is the mismanagement of teams.3. <i>Bureaucracy</i> is the arteriosclerosis of companies.	<p>Key 12 "PEOPLE MANAGEMENT"</p> <ol style="list-style-type: none">1. Don't underestimate keys for a healthy <i>culture</i>.2. Focus on effective <i>communications</i>.3. Perform excellent daily <i>coaching</i>.

Seven Steps Of Strategic Planning

This circle chart has the 7 steps of strategic planning, along with the implementation system that must follow these 7 planning steps.



Seven Steps Of Strategic Planning (continued)

One-Page Turbocharging Forms

Step One: Strategic Enterprise Assessment

Directions: Indicate the extent of your agreement regarding how your organization is performing in each of the following areas by circling the most accurate number.	Key:				
	0 Strongly Disagree	1 Disagree	2 Partly Agree	3 Agree	4 Strongly Agree
1. Our organizational structure, roles, and responsibilities are clearly defined and effective.	0	1	2	3	4
2. Our company culture is empowering, uplifting, pleasant, refreshing, and healthy.	0	1	2	3	4
3. Our executive/leadership team is knowledgeable, capable, and effective.	0	1	2	3	4
4. Our management/supervisory team is knowledgeable, capable, and effective.	0	1	2	3	4
5. Our employee/associate team is knowledgeable, capable, and effective.	0	1	2	3	4
6. Our communications in all directions (up, down, across, in, out) are efficient and effective.	0	1	2	3	4
7. Our technology (office, computers, machinery, etc.) is helping us be productive and cost-effective.	0	1	2	3	4
8. Our teamwork among departments, functions, offices, work groups, and teams is smooth and effective.	0	1	2	3	4
9. Our customer knowledge, service, needs-understanding, and actions are timely and effective.	0	1	2	3	4
10. Our competitor knowledge, plans, responses, and actions are timely and effective.	0	1	2	3	4
11. Our business knowledge and action concerning our industry, trends, economy, and global situation is adequate.	0	1	2	3	4
12. Our financial knowledge and action concerning sales, costs, profitability, banking, financing, cash flow, and equity is adequate.	0	1	2	3	4
13. Our strategic and business plan content is clear, complete, written down, and communicated.	0	1	2	3	4
14. Our market strategies, including product plans, services plans, geographic and sales plans, are clear, complete, and communicated.	0	1	2	3	4
15. Our strategic and business planning process is clear, complete, smooth, and effective.	0	1	2	3	4
16. Our strategic and business plan implementation is timely.	0	1	2	3	4

Seven Steps Of Strategic Planning (continued)

SEA Team Summary Form

Step One: Strategic Enterprise Assessment (continued)

Directions: Summarize the results of the SEA for multiple members of your team. A) Collect up to 10 team members' scores and record them below; B) Total scores for each SEA Category (rows 1-16); C) Divide the resulting total for each row by the total number of team members scoring the SEA and place the outcome in the second to the last column (Avg.)—Figure to one decimal point (e.g., 2.7); D) Rank the 16 SEA categories from 1st to 16th by resulting averaged scores (treat "ties" like PGA golf tournament placing); F) Plot the averaged scores on the SEA wheel graph on the following page.

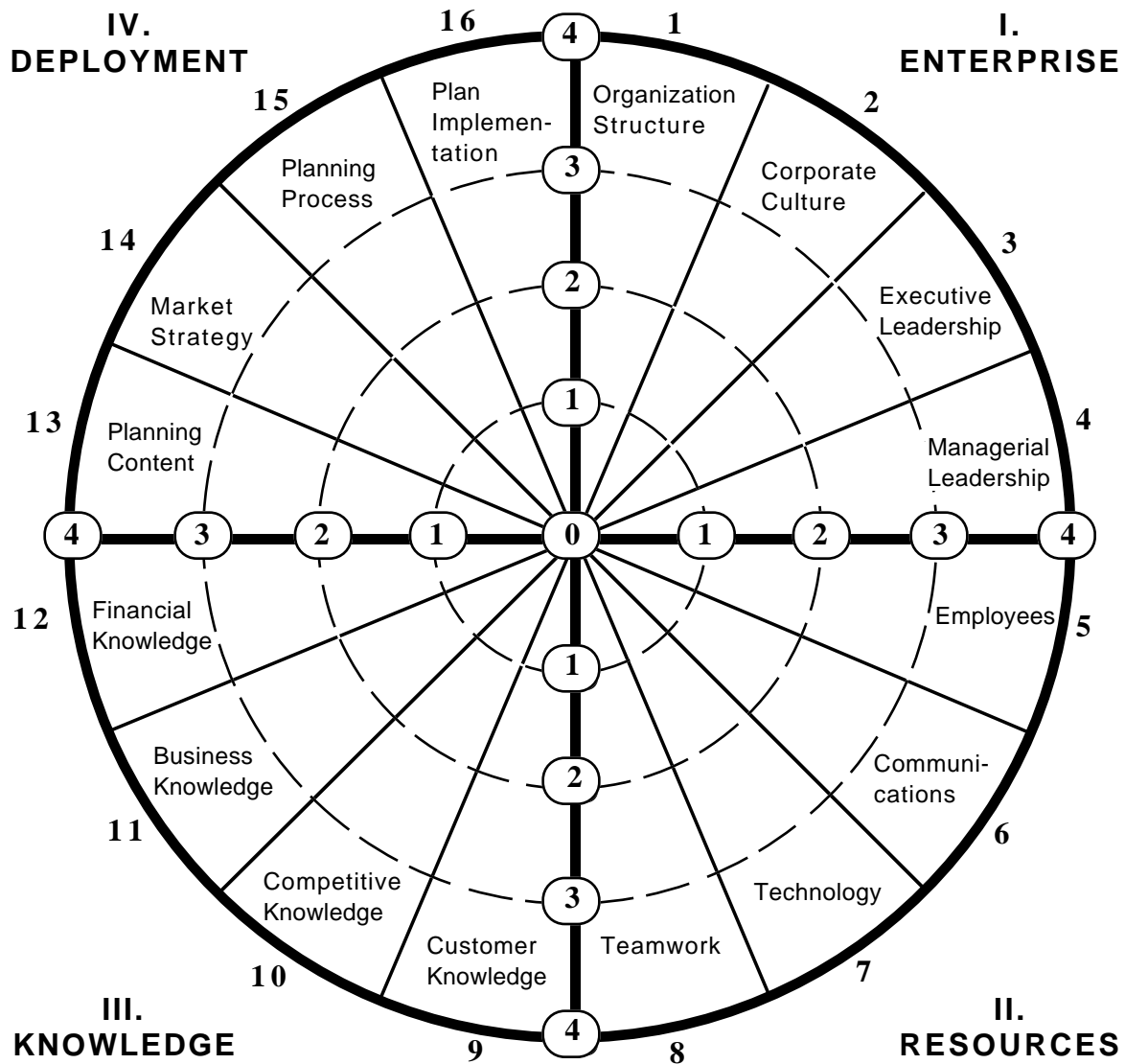
A scoring matrix to help with the math is provided on page 31 of Turbocharging Your Business! ↓

SEA Category Name:	Team Members										Total	Div. by #	Avg.	Rank 
1. Structure														
2. Culture														
3. Executive														
4. Managers														
5. Employees														
6. Communica- tions														
7. Technology														
8. Teamwork														
9. Customers														
10. Competitors														
11. Business														
12. Financial														
13. Plan Content														
14. Marketing														
15. Planning Process														
16. Implementation														

Seven Steps Of Strategic Planning (continued)

Step One: Strategic Enterprise Assessment (continued)

The Strategic Enterprise Assessment Wheel



Seven Steps Of Strategic Planning (continued)

Step One: Strategic Enterprise Assessment (continued)

SEA Benchmarking Data

Number of Reports:		152	93	59	
Quadrant/Category	Average, ALL	Average, 1st/Only's	Average, 2nd's-5th's	Diff., Prior Columns	2
I. Enterprise					
1	Structure	2.59	2.49	2.75	0.26
2	Culture	2.65	2.59	2.73	0.14
3	Executive	2.74	2.59	2.98	0.39
4	Managers	2.67	2.55	2.85	0.30
		2.66	2.56	2.83	0.27
II. Resources					
5	Employees	2.58	2.50	2.71	0.21
6	Communications	2.29	2.23	2.38	0.15
7	Technology	2.50	2.41	2.64	0.23
8	Teamwork	2.42	2.30	2.61	0.31
		2.45	2.36	2.59	0.23
III. Knowledge					
9	Customers	2.73	2.69	2.78	0.09
10	Competition	2.54	2.51	2.58	0.07
11	Business	2.66	2.52	2.87	0.35
12	Financial	2.78	2.66	2.98	0.32
		2.68	2.60	2.80	0.21
IV. Deployment					
13	Plans(Content)	2.52	2.35	2.79	0.44
14	Markets	2.44	2.35	2.57	0.22
15	Planning(Process)	2.36	2.20	2.63	0.43
16	Implementation	2.29	2.11	2.59	0.48
		2.40	2.25	2.65	0.39
Totals, All Categories		2.55	2.44	2.72	0.27


**First-Time
Benchmarks**

Seven Steps Of Strategic Planning (continued)

Step One: Strategic Enterprise Assessment (continued)

Analyzing Your SEA Results

Directions: Review and discuss your SEA scores and develop agreement on initial answers to the following questions: 1) **Why** these scores? (What are we seeing here? What should be noted and addressed? What is critical, what is not and why?), 2) **What** steps could we consider to address the issues or opportunities here discovered?

SEA Cat. #	Why these scores?	What steps could be considered (possible goals)
<input type="checkbox"/>	_____	_____
	_____	_____
	_____	_____
<input type="checkbox"/>	_____	_____
	_____	_____
	_____	_____
<input type="checkbox"/>	_____	_____
	_____	_____
	_____	_____
<input type="checkbox"/>	_____	_____
	_____	_____
	_____	_____

Seven Steps Of Strategic Planning (continued)

One-Page Turbocharging Forms (continued)

Step Two: Values Prioritization

Directions:

FIRST



Select five values from the following list that you feel best characterize what this enterprise should always aspire to and pursue. Spaces are provided if you have your own word or phrase other than those listed.

SECOND



After selecting these five values, order them in the following manner:
 Write in **5** points for your highest choice.
 Write in **4** points for your second choice.
 Write in **3** points for your third choice.
 Write in **2** points for your fourth choice.
 Write in **1** point for your fifth choice

Master Values List		
<input type="checkbox"/> Accuracy	<input type="checkbox"/> Financial	<input type="checkbox"/> Recognition
<input type="checkbox"/> Achievement-Oriented	<input type="checkbox"/> Growth-Oriented	<input type="checkbox"/> Reliability
<input type="checkbox"/> Best Investment	<input type="checkbox"/> High-Energy	<input type="checkbox"/> Respect For Individual
<input type="checkbox"/> Best Products	<input type="checkbox"/> High Market Perception	<input type="checkbox"/> Respectability
<input type="checkbox"/> Cohesive	<input type="checkbox"/> High Spirited	<input type="checkbox"/> Responsiveness
<input type="checkbox"/> Commitment	<input type="checkbox"/> Highest Value	<input type="checkbox"/> Results-Oriented
<input type="checkbox"/> Compassion	<input type="checkbox"/> Highly Specialized	<input type="checkbox"/> Rewarding
<input type="checkbox"/> Consistency	<input type="checkbox"/> Industry Pioneer	<input type="checkbox"/> Safe-Choice Provider
<input type="checkbox"/> Cooperation	<input type="checkbox"/> Industry Standard	<input type="checkbox"/> Social Responsibility
<input type="checkbox"/> Cost-Effective	<input type="checkbox"/> Innovation	<input type="checkbox"/> Solution-Oriented
<input type="checkbox"/> Creativity	<input type="checkbox"/> Integrity/Honesty	<input type="checkbox"/> Special Expertise
<input type="checkbox"/> Credibility	<input type="checkbox"/> Leadership	<input type="checkbox"/> State-of-the-Art
<input type="checkbox"/> Customer-Oriented	<input type="checkbox"/> Loyalty	<input type="checkbox"/> Success-Oriented
<input type="checkbox"/> Customer Service	<input type="checkbox"/> Market Leader	<input type="checkbox"/> Supportive
<input type="checkbox"/> Decisive	<input type="checkbox"/> Most Competitive	<input type="checkbox"/> Teamwork
<input type="checkbox"/> Dependability	<input type="checkbox"/> Most Efficient & Effective	<input type="checkbox"/> Technology-Driven
<input type="checkbox"/> Discipline	<input type="checkbox"/> Performance-Driven	<input type="checkbox"/> Trustworthy
<input type="checkbox"/> Empowerment	<input type="checkbox"/> Proactive	<input type="checkbox"/> Unique
<input type="checkbox"/> Enthusiasm	<input type="checkbox"/> Profitability	<input type="checkbox"/> Visionary
<input type="checkbox"/> Entrepreneurial	<input type="checkbox"/> Progressive	<input type="checkbox"/> _____ (Your Own)
<input type="checkbox"/> Excellence	<input type="checkbox"/> Quality	<input type="checkbox"/> _____ (Your Own)


Your Top Five Values According To Your Point Assignments			
#1	_____ (5 pts.)	#4	_____ (2 pts.)
#2	_____ (4 pts.)	#5	_____ (1 pt.)
#3	_____ (3 pts.)		

Seven Steps Of Strategic Planning (continued)

Values Prioritization Team Summary Form

Step Two: Values Prioritization (continued)

Directions: Summarize the Values Prioritization exercise for up to 10 members of your team on the following form. A) For each person, collect top 5 values and place them in left column (Selected Values) and record number of votes below that person's name; B) If a subsequent person votes for the same value put it in the row following that term and below the person's name. If it's a new value add to the Selected Values list and write in the number of votes for that item ; C) Determine if any values are synonyms and combine. Transfer votes. D) Add up total votes for each value category, then rank values according to Total Votes score. E) **Extra credit:** audit each of the team's top values regarding how well each value is being lived out in the company [0-10 where 0 = "no evidence of that value" and 10 = "walking the talk"].

Selected Values Name:	Team Members' Votes										Transfer Votes	Total. Votes	Rank 	Audit
1. _____														
2. _____														
3. _____														
4. _____														
5. _____														
6. _____														
7. _____														
8. _____														
9. _____														
10. _____														
11. _____														
12. _____														
13. _____														
14. _____														
15. _____														
16. _____														
17. _____														
18. _____														
19. _____														
20. _____														

TURBOCHARGING YOUR BUSINESS

Seven Steps Of Strategic Planning (continued)

One Page Turbocharging Forms (continued)

Step Three: External Analysis

Directions: Analyze and summarize your portfolio of products and services on the following form. Discuss each team member's analysis for each existing and future product or service and develop a quick working consensus score for each. Record the results of this discussion below. Finally, if useful and insightful, rank each item's perceived importance (overall, with all things considered) within the portfolio based upon the result this analysis.

Analysis Aspect Portfolio Item	% of Sales	% of GP\$	% of Leadership Time	Quality Grade (0-10) to Customer	Price Grade (0-10) vs. Compet.	The Market's Attractiveness (0-10) for Mkt. growth and share	Your Market Power (0-10 0=none 10=total)	Your Capital Ease (0-10 0=very costly 10=none)	Portfolio Rank [Last Step]
EXISTING:									
1.	%	%	%						
2.	%	%	%						
3.	%	%	%						
4.	%	%	%						
5.	%	%	%						
6.	%	%	%						
TOTALS	100%	100%	100%						
FUTURE:									
1.									
2.									
3.									
4.									
5.									

Seven Steps Of Strategic Planning (continued)

One-Page Turbocharging Forms (continued)

Step Four: "SF SWOT" (Pluses and Minuses)

Directions: Identify key lists for the following categories.

Definition: SF = The **Successes** and **Failures** that have happened in the enterprise during the last year or so. Like a financial income statement, this category of analysis measures “*what actually happened*” during the indicated time frame. **Question:** What have you recently attempted to do in the business that either was successful (you accomplished what you were aiming for) or was unsuccessful (you did not meet your expectations), hence failures, or at the least, you “can do better?”

SUCSESSES (Past Positive Actions)

- _____
- _____
- _____

FAILURES (Past Negative Actions)

- _____
- _____
- _____

Definition: SW = The **Strengths** and **Weaknesses** of the organization. Here we are not looking at events but current conditions, characteristics. Like a financial balance statement, this measures the various “assets” and “liabilities” of the organization as it exists at this present time and in the recent past. **Question:** What resources, personnel, unique market advantages, products, services, and so forth, are a part of your business situation and are either strengths (which you can build with) or weaknesses (which you can strengthen or resolve)?

STRENGTHS (Present Positive Conditions)

- _____
- _____
- _____

WEAKNESSES (Present Negative Conditions)

- _____
- _____
- _____

Definition: OT = The **Opportunities** and the **Threats** that confront the organization. Here we are looking into the future. These are factors that are not really under your control but must still be taken into account as you develop your strategy. **Question:** What factors or conditions of your business environment pose opportunities (which you can take advantage or capitalize on) or threats (which must either be transformed into opportunities or be avoided by the enterprise)?

OPPORTUNITIES (Future Positive Possibilities)

- _____
- _____
- _____

THREATS (Future Negative Possibilities)

- _____
- _____
- _____

Seven Steps Of Strategic Planning (continued)

SF SWOT Team Summary Form

Step Four: "SF SWOT" (Pluses and Minuses) (continued)

Directions: The objective of this summary is to collectively identify/agree upon quickly the Top 3 items for each category and to develop observations about how these insights might be used to impact the future development of the company. A) Discuss each category of the SF SWOT and reach agreement on the 3 most major ones for each category; B) For each of your agreed upon Top 3 (per category), identify best responses for each to best address in coming years.

TOP 3 SUCCESSES (Past Positive Actions [Last 12 mos.]) TOP 3 LESSONS LEARNED

- | | |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |

TOP 3 FAILURES (Past Negative Actions [Last 12 mos.]) TOP 3 LESSONS LEARNED

- | | |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |

TOP 3 STRENGTHS (Present Positive Conditions) TOP 3 WAYS TO EXPLOIT

- | | |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |

TOP 3 WEAKNESSES (Present Negative Conditions) TOP 3 WAYS TO OVERCOME

- | | |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |

TOP 3 OPPORTUNITIES (Future Positive Possibilities) TOP 3 WAYS TO CAPTURE

- | | |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |

TOP 3 THREATS (Future Negative Possibilities) TOP 3 WAYS TO AVOID OR TRANSFORM

- | | |
|----------|-------|
| 1. _____ | _____ |
| 2. _____ | _____ |
| 3. _____ | _____ |

Seven Steps Of Strategic Planning (continued)

One-Page Turbocharging Forms (continued)

Step Five: Vision Development

Directions: For each of the following, develop a brief, simple phrase.

1. What will your **primary product(s) or service(s)** be in five years? _____

2. What will your **primary market(s)** be in five years? _____

3. Who will your **primary customer(s)** be in five years? _____

4. What distinctive feature or offering of your enterprise **will make you stand out among your competitors** in five years? _____

5. What will the **geographic coverage** of your enterprise (local/regional national/multinational/global) be in five years? _____

6. **How big** do you see the enterprise in five years in:
Total Sales: \$ _____ Types of Locations: _____
Total Profits: \$ _____ (Mfg., Distrib., Sales,
Total No. Employees: _____ Service, HQ, etc.)
Total No. Locations: _____ Annual Rate of Sales Growth to Achieve Target: _____ %
Annual Net Profit Increase to Achieve Target: _____ %
7. What do you perceive your **competitive position** will be in five years (monopoly/duopoly leaders, one of the "middle of the pack," follower, pioneer, niche specialist, etc.)? _____

8. What kind of **special factors** (culture/unique approaches) will make the far-future enterprise a very special work experience? _____

9. If you came across an advance copy of the Wall Street Journal for January 1, 2005, and your company was featured as a lead story, how would the headline read (Limit 20 words): _____

Seven Steps Of Strategic Planning (continued)

Vision Development Team Summary Form

Step Five: Vision Development (continued)

Directions: Discuss each team member's answers to the eight questions asked in this survey. The goal is to reach a reasonable sense of consensus about these projections. Agree on a few key elements and write below.

1. What will your **primary product(s) or service(s)** be in five years?
2. What will your **primary market(s)** be in five years?
3. Who will your **primary customer(s)** be in five years?
4. What distinctive feature or offering of your enterprise **will make you stand out among your competitors** in five years?
5. What will the **geographic coverage** of your enterprise (local/regional national/multinational/global) be in five years?
6. **How big** do you see the enterprise in five years in:


Total Sales:	\$	Types of Locations:	
Total Profits:	\$		
Total No. Employees:			Annual Rate of Sales Growth to Achieve Target: <input style="width: 40px;" type="text"/> %
Total No. Locations:			Annual Net Profit Increase to Achieve Target: <input style="width: 40px;" type="text"/> %
7. What do you perceive your **competitive position** will be in five years (monopoly/duopoly leaders, one of the "middle of the pack," follower, pioneer, niche specialist, etc.)?
8. What kind of **special factors** (culture/unique approaches) will make the far-future enterprise a very special work experience?

Seven Steps Of Strategic Planning (continued)

One-Page Turbocharging Forms (continued)

Step Six: Goal Identification

Directions: As you work through the various Turbocharging One-Page forms, use the following form to collect your thoughts and insights about strategic issues or goal items for your company. Use the 90-10 Rule (or some relative variant thereof) to guide your thinking: What 10% of possible actions will accomplish 90% of the results for your company? Identify major "bullets" (integral components) of each goal and the timing for its completion. Finally, rank your goals list in terms of strategic priority for implementation.

Strategic Goal:	This would include the following: (Subset or interrelated items)	Optimum time frame Start: Finish:	Rank 
1.	• • •	___/___ to ___/___	<input type="text"/>
2.	• • •	___/___ to ___/___	<input type="text"/>
3.	• • •	___/___ to ___/___	<input type="text"/>
4.	• • •	___/___ to ___/___	<input type="text"/>
5.	• • •	___/___ to ___/___	<input type="text"/>
6.	• • •	___/___ to ___/___	<input type="text"/>
7.	• • •	___/___ to ___/___	<input type="text"/>
8.	• • •	___/___ to ___/___	<input type="text"/>
9.	• • •	___/___ to ___/___	<input type="text"/>
10.	• • •	___/___ to ___/___	<input type="text"/>

Seven Steps Of Strategic Planning (continued)

One-Page Turbocharging Forms (continued)

Step Seven: Action Plan Summary Form

Directions: Translate your top 3 goals into specific action plans, with team leaders, team members, and action plans with due-dates.

#	Goal Name/Goal Description	Due Dates
<input type="checkbox"/>	_____	
	Goal Team Members	Ltr. # Action Plans to Complete this Goal Person Resp.
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
* = Team Leader		
<input type="checkbox"/>	_____	
	Goal Team Members	Ltr. # Action Plans to Complete this Goal Person Resp.
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
* = Team Leader		
<input type="checkbox"/>	_____	
	Goal Team Members	Ltr. # Action Plans to Complete this Goal Person Resp.
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
•	_____	<input type="checkbox"/> _____ _____ __/ __/ __
* = Team Leader		

Monthly Implementation Process: Making It Happen

A. Overview

As the "heart" of the strategic plan is its prioritized major goals, so the "hands and feet" of it are the major action plans (the implementational content) and the monthly tracking meeting (the implementation process). As mentioned prior, likening the goals portfolio as the reservoir for the water, the monthly meeting is the aqueduct flowing the action plans, the water, to all needed places, the operating arenas. This section covers the monthly implementation system.

B. Monthly Meeting Elements

1. Week of Month: _____
2. Day of Week: _____
3. Start Time: _____
4. Block Until: _____
5. 1999 Schedule: (List meeting dates month by month.)

__/__/__	__/__/__	__/__/__	__/__/__
__/__/__	__/__/__	__/__/__	__/__/__
__/__/__	__/__/__	__/__/__	__/__/__

C. Monthly Meeting Agenda

Excellent monthly implementation meetings include these 4 vital sections:

1. *Key Indicators* (Quantitative Operations).
2. *2-Minute Drills* (Qualitative Operations).
3. *Action Plans Review*.
4. *New-News Discussion/Closure* ("Parking Lot Items").

D. Meeting Specifics

1. Key Indicators: Generic Form

Indicator Type	Current Month			Year-To-Date			Prior Year Actual	
	Plan	Actual	Variance	Plan	Actual	Variance	Month	YTD
• Financial								
• Business								
• Quality								
• Customer								

Monthly Implementation Process: Making It Happen (continued)

D. Meeting Specifics (continued)

2. Two-Minute Drills:

The following are key characteristics of the 2-minute drills:

<ul style="list-style-type: none"> • Each Person <i>"Inclusive"</i> 	<ul style="list-style-type: none"> • Major Items <i>"Netting Key Information"</i>
<ul style="list-style-type: none"> • Turbo (Max. 3 Minutes) <i>"Speed"</i> 	<ul style="list-style-type: none"> • Cross-Pollinating <i>"Team of Generalists"</i>
<ul style="list-style-type: none"> • Bulletized <i>"Brief Points"</i> 	<ul style="list-style-type: none"> • Summarized and Distributed <i>"Timely Communications"</i> • ID New-News Actions

- a. Great communications tool.
- b. Given 2 minutes/warning/3rd minute/cold stop!
- c. Timed and monitored.
- d. "What are the main things others should know?"
- e. Summarize to 4-6 "bullets."
- f. Prepare a simple written list prior.
- g. Submit to central person for summarization.

2-Minute Drill Form	
Name:	_____
"Best" of Month:	_____

"Worst" of Month:	_____

Other Highlights:	_____

3. Major Action Plans:

- a. Review each month's ones that have come due.
- b. These are:
 - Specific, measurable steps to meet goals.
 - Time-bounded: [mm/dd/yy]/on monthly meeting date.
 - Person(s) responsible.

Monthly Implementation Process: Making It Happen (continued)

D. Meeting Specifics (continued)

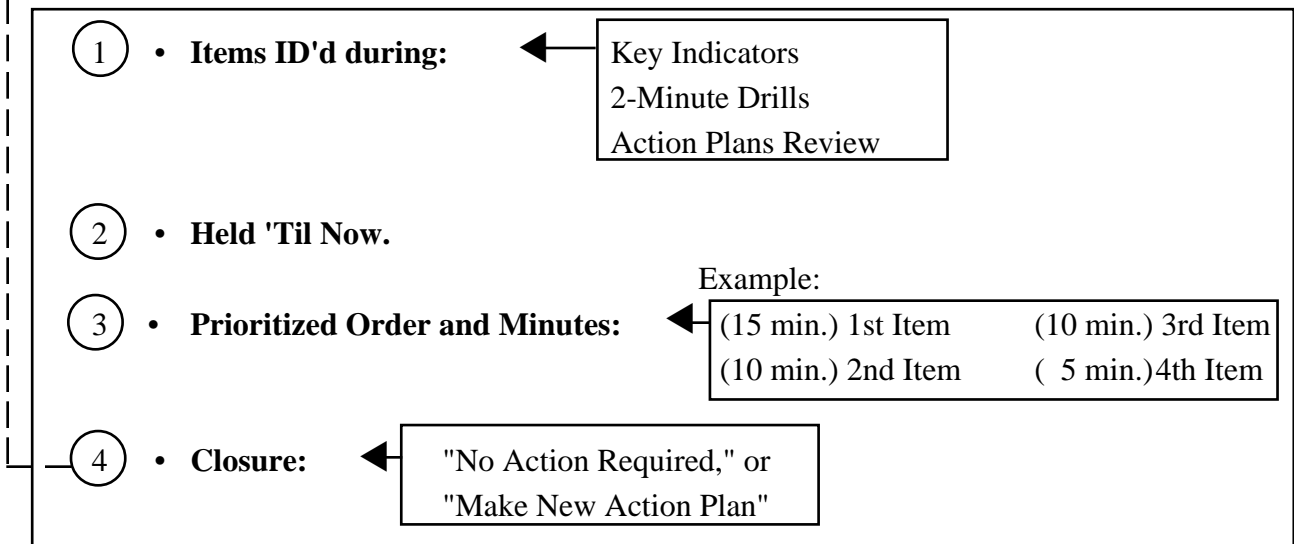
3. Major Action Plans: (continued)

- c. **Action Plans' Review:** Each goal has checkpoints, reviewed in a given month. Some goals are reviewed monthly, or more frequently.

Sequence	Type of Action Plan	Review Modality/Outcome
①	• Past-Due Action Plans	• <i>Done Yet?</i> /Review and Close Out.
②	• Currently-Due Action Plans	• <i>Done?</i> /Review and Close Out.
③	• Next Month's Action Plans	• <i>On-Track?</i> /Pursue and Do or Mid-Course Correct.
④	• New Action Plans? (From: Key Indicators; 2-Minute Drills; Action Plan Review; New Topics.)	• <i>Write Up/Add</i> to Chronological Action Plan List.



4. New-Matters/Address New Issues:



Monthly Implementation Process: Making It Happen (continued)

E. Meeting Facilitation and Administration:

1. Responsibilities:

Agenda Element	Facilitator	Administration
Overall		
Key Indicators		
2-Minute Drills		
Action Plans List (Open)		
New-News Review		

2. Input/Output Deadlines:

	Deadline:	To:
a. Data inputs for Key Indicators:	Tues., Noon Prior	
b. Team/Goal Leader meetings handout:	Tues., Noon Prior	
c. Minutes distributed after meeting:	Mon., Noon After	

IV. Teamwork, Meetings, and Time Management Tips

THE
GOAL:
RETURN
ON
ENERGY!

Reminder: Principles That Build Teamwork	Reminder: Principles That Improve Time Management
<ol style="list-style-type: none"> 1. Don't allow "us-them." 2. The sum exceed the parts. 3. Really plan "win-win." 4. Take personal ownership. 5. Team build, don't team break. 6. Eliminate gossip. 7. Go to the source of the problem, not others. 8. Go the extra mile. 9. Drop old baggage. 10. Help others succeed. 11. Don't be "dead" right successful surgery/ideal patient. 12. One time around: enjoy the journey. 	<ol style="list-style-type: none"> 1. "What is the highest and best use of my time right now?" 2. Delegate, defer, delete, outsource. 3. Highest return on energy. 4. Proactive, preventative, important. 5. Constructive impatience. 6. Flexibility and focus/I and we win. 7. Batching/clustering: phone calls, voice/e-mail, meetings. 8. Buffering: allow time for revision. 9. Personal office hours: set open-door times. 10. Define "interruptions/emergencies." 11. Best overall process; "7 x 24" allocating. 12. Life balance: not just work. 13. Meetings diet — eliminate, shorten, focus: remember how much time can be saved by budgeting meetings wisely.
Reminder: Constructive Rules of Meeting	
<ol style="list-style-type: none"> 1. Keep a fast pace; start on time! 2. Everyone participate. 3. No one dominate. 4. Be constructive, not negative. 5. Avoid "dead right" defensiveness. 6. Accept personal ownership. 7. Bring a solution if possible. 8. Practice teamwork; going to the source. 9. Stay on track; focus: stay with written agenda. 10. Don't be afraid to ask. 11. Be open to change; flexibility if need be. 12. Reach closure on open issues. 13. No pocket vetoes/hidden agendas. 14. No private comments, conversations. 15. Take "small stuff" off-line. 16. Maximize your use of time. 17. Utilize the "80-20" Rule. 18. "Close," by documenting action plans. 	

Turbocharging Workshop "Parking Lot"

During the course of this workshop issues will be raised that you will not have time to adequately address, but you will want to record them and come back to them later. This final page is provided as a place to "park" these ideas, discussions items, possible goals or objectives, and other issues worthy of further time and attention.

Item/issue description	Person(s) Responsible	Date to revisit?
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__
▶ _____	_____	__/__/__