## StrategicAction<sup>sm</sup> Planning Process

Define
What, Why, Who and How

Situation Analysis
Where are we?

Strategies, Objectives, Actions
What do we want to achieve?
How are we going to get
there?

## **Provide Clarity**

- <u>Mission</u> What's are business?
- Why?
- Vision What are we going to be?
- Guiding Principles/ Core Values
   How will we achieve it?

## Assess Facts and Data Draw Conclusions

- Market Analysis
   Evaluate and prioritize market opportunities
- Competitive Analysis
   Identify current competitive
   advantages & areas for
   improvement. Determine where
   potential needs are not fully being
   met.
- Internal Analysis
  Review history for lessons learned.
  Assess current capabilities vs.
  market expectations and
  competitors. Evaluate the
  effectiveness of key policies and
  processes. Is the voice of the
  customer being heard?
- External Analysis
   Identify and evaluate the macro external factors.
- <u>SWOT</u> Draw conclusions and prioritize

## Provide a Roadmap and Create Accountability

- Create the strategies to capitalize on the strengths /opportunities; address the areas for improvement; protect against the threats
- Define success by establishing primary financial and non-financial objectives
- Establish the roadmap by establishing milestone objectives, action plans, timetables and individual accountabilities.