

Mission Resources Group

The Lowcountry's Multi-Discipline Management Consulting Team

Strategic Planning Overview

Beaufort Regional Chamber of Commerce
Bluffton Networking Group
October 6, 2011

Paul Jacobson
paul.jacobson@mrgroup.biz
(843) 540-3759
www.mrgroup.biz



Optimize Performance. Maximize Results.

Planning



**Making decisions NOW
that you will implement later**

- **Directions**
- **Actions**

**Planning is a business process,
with a life-cycle, steps and deliverables.**

Optimize Performance. Maximize Results.

Planning Cycle



Basics... Set once, review periodically

- **Vision...** *Short, succinct, and inspiring statement of what the organization intends to become and to achieve at some point in the future*
- **Mission...** *Who are we? What do we do? Why do we exist? What are our values?*

Optimize Performance. Maximize Results.

Planning Cycle



Each Planning Cycle... Expected business environment

- **Assumptions...** *What do you think that your “world” will look like when you implement the plan?*
- **Constraints & Issues...** *What might inhibit achieving your vision and objectives? Consider people, property, funds, time, space, relationships, competition and any other relevant factors.*
- **Enablers...** *What resources do you have or what resources can you obtain that will help in achieving your vision and objectives? Consider people, property, funds, time, space, relationships and any other relevant factors.*

Optimize Performance. Maximize Results.

Planning Cycle



Each Planning Cycle... Goals & Objectives

- *What do you need to do to achieve your vision, given the expected environment?*
- *When do you need to achieve success?*
- *Who has the responsibility for success?*
- *What are the measures of success?*

Optimize Performance. Maximize Results.

Planning Cycle



Project Planning...

Define/Describe Initiatives to attain Goals/Objectives

Scope & approach (i.e. Strategies & tactics)

- Strategies... HOW? *Major decisions and approaches*
- Tactics... how?
 - *Minor decisions within major decisions*
 - *Tasks/steps*

Optimize Performance. Maximize Results.

Planning Cycle



Project Planning...

Define/Describe Initiatives to attain Goals/Objectives

- Prospective budgets... Plan ALL resources
 - *\$, time, people, space, equipment, supplies, materials, etc.*
- Feasibility study... Reality check
 - *Will it work?*
 - *Is it affordable?*

More needed to create REAL Business Plan

- **Financial Plans: Funding, Cash Flow, etc.**
- **Marketing Plans: Product, Place, Price, Promotion, Packaging, etc.**

Optimize Performance. Maximize Results.

Reality Check

***“No plan survives the first contact with the enemy.”
The Art of War, Sun Tzu***



What are the weak points in the plans?

- *Where is it likely to fail? (Murphy's Law)*
- *Look at Assumptions & Constraints*

- How will you know EARLY that the plan is failing?

Optimize Performance. Maximize Results.

Reality Check

***“No plan survives the first contact with the enemy.”
The Art of War, Sun Tzu***



- What will you do to react & recover?
 - *Difficult to recover if Strategy fails*
 - *Expect & plan for Tactics failures*
- Agility... Function of Flexibility & Speed
 - *Flexibility... Willing to change & good at change with minimal disruption*
 - *Speed... How quickly can you change & adjust?*
- Contingency Planning
 - *Pre-plan alternative frameworks*
 - *Pre-make alternative decisions*

Optimize Performance. Maximize Results.

Reality Check



TANSTAAFL

There Ain't No Such Thing As a Free Lunch

Robert A. Heinlein

- Every decision costs
 - Direct
 - Indirect
 - Opportunity... Forgo other directions
- The Law of Unintended Consequences

Optimize Performance. Maximize Results.

Mission Resources Group

The Lowcountry's Multi-Discipline Management Consulting Team

Strategic Planning Overview

Beaufort Regional Chamber of Commerce
Bluffton Networking Group
October 6, 2011

Paul Jacobson
paul.jacobson@mrgroup.biz
(843) 540-3759
www.mrgroup.biz



Optimize Performance. Maximize Results.