

Strategic Planning Primer

Business Management For Results



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Strategic Planning

1. Strategic facilitation is the discussion and prioritization of ideas and direction
2. Strategic planning is creating action plans to execute strategy through people, process, and systems

Strategic Process

Assess External Environment	Build Strategic Planning Direction
Economic trends	Board-executive-management operating philosophy
Peer analysis	Set performance drivers and targets
Competitor strengths and weaknesses	Leverage product, market, and customer strengths
Customer SWOT	Solve product, market or service weaknesses
	Plan for sales and operations effectiveness
Assess Internal Environment	Align organization structure to strategy
Board-executive-management SWOT and GAP analysis	Programs to develop and retain employees
Company SWOT	Programs to foster community involvement
Identification of projects and initiatives	Acquisition and new business ventures
Sales effectiveness and priorities	Sale or closure of underperforming business
Operations & Support effectiveness and priorities	
Specific board or executive level topics and issues	
Employee and management topics and issues	

Strategic Execution

- Where do boards, executives, and management have conflicting business philosophies that will hinder projects and initiatives?
- Are managers and employees stretched across many projects and initiatives in the organization?
- Are strategies and initiatives prioritized so that employees can determine their focus when faced with projects that compete for their time and energy?
- What is the strategic direction and what is the operating direction?

Strategic Tools

Executive survey and interview	Strategic Plan Vision – Category-Goal-Initiatives
Board, Executive, and Management level GAP analysis	Initiative and project prioritization
Company SWOT analysis	Action plans and resource assignments
Customer SWOT analysis	Link budgets and business plans to strategy
Competitor SWOT analysis	Measurement and follow-up on execution

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