



# PLAN FOR SUCCESS

## Five Steps to an Effective Planning Process

*"If you don't know where you're going, any road will get you there."* Lewis Carroll

*". . . And you're probably not going to like where you end up."* Janet Treer

Planning the course of your business is one of the most effective, low-cost ways to improve your company's performance and bottom line. But if you're like many executives, you keep putting it off to focus on day-to-day operations, put out fires and deal with an endless stream of demands that just can't wait. You sincerely intend to do strategic planning, but it never happens. The answer is to implement a step-by-step process that keeps you on track as you and your team identify the path your organization should take. It needs to be efficient, inclusive and produce specific, tangible follow-up actions.

It is important to start with a clear understanding that strategic planning is an ongoing process that requires firm commitment. That does not mean it should overburden your management team with endless work and meetings that do little to advance your organization's competitive position, profitability and culture. A properly designed and facilitated planning process will efficiently guide your team from organizational goals to specific objectives and actions for every member. That leads to better performance in all areas and a stronger team culture.

Developing your strategic plan takes a multi-step process that encompasses your vision, values, mission, strategic initiatives, goals and specific action steps. It can be accomplished through the following:

### Step 1: Visioning

Your organization's vision is a statement of its potential. Your vision statement gives a clear description of what you want your organization to become. This, in conjunction with your values and mission statement is the foundation of all further planning.

### Step 2: Strategic Thinking and Planning

Strategic thinking is the process you go through to decide what direction your company should take. It considers every aspect of your company, its assets, resources, challenges and opportunities. This is where your planning team draws upon its knowledge and insight to envision the future and how to get there. The result of this step should be a clear, viable plan for achieving the future success of your company.

### Step 3: Business Planning

Next, you need to create specific goals that will move you in the right direction. Different departments or components of your organization will have individual missions, goals and actions for their areas that coalesce into one initiative for the overall company. This is your roadmap for success.



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#### Step 4: Implementation

With well-conceived action plans clearly stated and owned by your management team, implementation can occur. This is where you and your team make it happen. There must be activity schedules, accountabilities, tracking and evaluation to make sure your plan does not just gather dust on office shelves.

#### Step 5: Review and Continuous Improvement

Reviewing your progress and measuring the results enable you and your team to see the progress you are making. This management information can be used to keep people and activities on track, identify necessary changes and continuously improve the process and your company.

Implementing and diligently maintaining an effective strategic planning process can make a significant positive impact on your company. With proper design and facilitation, it will take less time than you probably think, while truly energizing your team. Consider starting now.