



SMALL BUSINESS STRATEGIC PLANNING

LAYING THE FOUNDATION FOR TOMORROW'S SUCCESS
WHILE COMPETING TO WIN TODAY.

"The mindset of growth starts with looking at your business from the outside in. This is a simple shift of perspective, but it's what separates the growth leaders from the also-rans."

Ram Charan and Noel Tichy;
Every Business is a Growth Business, 1998

FLEXIBILITY – The workshops are modularized and delivered over several weeks; this allows topics to be practiced and strategy components to be assembled systematically.

COMPETANCY BASED – Participants come out of each workshop with skills and that they can immediately use to improve their business performance.

SPACED LEARNING – The workshops are spaced over time to allow the participants to manage their time and master the material between sessions.

STATE OF THE ART MATERIALS – The participant workbooks are the best on the market today to ensure availability for reuse, and maximum benefit.

CUSTOMER FOCUSED TRAINING – The training meets small business needs and helps make critical implementation decisions for lasting results.

Alidade MER, Inc. is a certified 360 Solutions Team Member, providing high quality content, methods and training materials to public and private organizations

Most organizations face stiff challenges in today's environment. Difficulty finding qualified workers, competing technologies, a slowing economy and demanding consumers demand put extreme pressure on small businesses.

In addition, it can also be extremely difficult for small businesses to get financing to grow the business without a good business plan.

Too many small businesses respond to challenges by trying to do what they have done in the past; they simply try working harder at it. Smart businesses succeed by aligning their objectives and actions with current and future realities.

Core Strategic Decisions

Strategy is defined as the way an organization plans to meet the challenges and opportunities presented by the business environment. It consists of a set of conscious choices about how it will deliver value to its customers and distinguish itself from its competitors.

By participating in this program, you and members of your organization will:

- Understand the challenges and opportunities in your external environment.
- Identify assumptions about the future.
- Clarify the message of your business in a way that motivates and inspires.
- Identify the principles by which your team will conduct themselves.
- Define your future customers and how you will deliver value to them.
- Identify basic competencies needed to perform in the long run.
- Create a long-term business focus.
- Understand the anchors that distinguish you from your competitors.
- Set short-term performance goals.
- Establish performance initiatives and a master plan to manage your goals.

An Imperative

Formulating a clear and compelling strategy is among the most important work that leaders of a small business can accomplish. It is not something that would be "nice to do" when you have more time, it is essential to the businesses survival.

Contact Tom Moriarty, PE, MBA for more information:

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Module 1: Overview of Strategy

- Learn the meaning and important elements of strategy
- Explore three approaches to strategy
- Assess the current strategy of your organization
- Assess the current results of your strategy
- Learn the strategic plan design process

Module 2: Analyzing The Business Environment

- Identify key customers, key stakeholders, and their expectations
- Identify key suppliers, and rate your relationship with them
- Evaluate current market conditions affecting your organization
- Review the strengths and weaknesses of key competitors

Module 3: Forecasting The Future

- Identify assumptions about the future
- Reduce this list into the “big hitters”, which define your expectations of the future
- Evaluate the impact of the “big hitters” on your organizations
- Determine how your organization might respond to each of these assumptions
- Identify alternatives for the future of your business
- Conduct a SWOT analysis to prepare for the future

Module 4: Creating Core Ideology

- Understand the role of a core ideology in your organization's success
- Learn about the ideologies of some of the most successful companies
- Explore the legacy of your organization
- Define your organization's mission
- Analyze the beliefs that have created your culture
- Reach consensus on your guiding principles

Module 5: Defining Your Strategic Direction

- Understand the primary questions that must be answered to establish strategic direction
- Clarify a vision of your organization five years into the future
- Identify the characteristics of your current customers and the deliverables they expect
- Describe your future customers and the products or services needed to meet their needs
- Explore your core competencies and the competencies you will need to be successful in the future

Module 6: Defining Your Competitive Advantage

- Understand customer's perceptions of value
- Create a long-term business focus
- Identify competitive differentiators within your industry
- Do a competitor analysis
- Select competitive anchors that distinguish you from your competitors
- Develop a value proposition

Module 7: Setting Goals

- Understand the importance of setting goals and tracking performance
- Learn the building blocks of goal-setting
- Identify your organization's key results areas
- Assess your current performance to key result areas
- Set goals in each of your key results areas
- Evaluate your feedback system
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Module 8: Creating a Master Plan

- Understand the importance of an integrated Master Business Plan
- Select the critical success factors for your business
- Identify major initiatives to implement you ideal vision
- Create an initiatives matrix showing the relationship between your critical success factors and performance
- Learn how to create a project charter to guide the implementation of improvement initiatives
- Commission project teams for each initiative
- Manage the Master Business Plan