

This workbook is designed to provide step-by-step activities to guide you in developing a multi-year strategic plan.

As the leader of the organization you can choose whom to involve and how you want to include others in the process. Each organization is different and your culture, organizational size, and roles will influence that decision for you.

Generally, involving those responsible for implementation is helpful as they often have interesting insights about opportunities and you want to have their understanding and support as you move toward implementation.

Don't forget to include non-employees who are critical to your success (such as reps, vendors, and key customers).

The workbook covers all three key stages of plan development and each stage is divided into several steps.

Discovery

- Market Assessment
- Competitive Assessment
- Business Assessment

Development

- Strategic Position
- Target Customer
- Value Proposition
- Distribution
- Profit Driver
- Mix Shift
- Decision Criteria
- Key Programs or Initiatives

Delivery

- Timeline
- Resource Implications Financial Forecast
- Performance Measures
- Communication Plan

Involve people relevant to the issues being addressed.

Including key stakeholders may mean reaching outside the company.