Capacity Building Solutions, Inc.

Strategic Planning Outline

1. Statement of Mission/Business:
   1. Asking the fundamental question that drives business success (Source: Jim Collins – Built To Last and Good To Great)
      1. Core Ideology
         1. What is your core purpose?
         2. What are your core values?
      2. Hedgehog Theory
         1. What are you most passionate about?
         2. What are you best at (better than your competitors)?
         3. What is your economic denominator?
2. Success Visioning:
   1. What are the Critical Success Factors?
   2. What does success look like 1, 3 and 5 years out?
   3. What are the longer-term success objectives?
3. Key Assumptions:
   1. What are the key assumptions driving our business?
   2. How would we rank these assumptions and their impact on our business?
   3. What are assumptions that need to be further tested versus facts that require a response strategy?
4. SWOT Analysis:
   1. What is the plan for leveraging organizational strengths?
   2. What is the plan for managing organizational weaknesses?
   3. What is the plan for taking advantage of market opportunities?
   4. What is the plan for responding to market threats? Where are we vulnerable?
5. Product and Service Analysis:
   1. How do each of product and service areas compare against external market realities and financial performance issues?
6. Customer Analysis (Source: Peter Drucker)
   1. Who are our customers?
   2. How do we rank these customers in terms of their value to our organization and their market potential?
   3. What do our most important/target customers value?
   4. What is our record to date in delivering value to these customer groups?
   5. What is the plan to maintain and increase the value to these customers?
7. Goals, Strategies and Measurement (Source: Robert Kaplan – The Strategy Focused Organization):
   1. Balanced Scorecard Approach
      1. What are the key Financial Goals, Strategies and Measures?
      2. What are the key Internal/Operational Goals, Strategies and Measures?
      3. What are the key Customer Impact Goals, Strategies and Measures?
      4. What are the key Learning Goals, Strategies and Measures?
8. Accountability/Ownership
   1. What is our workplan to achieve key strategic objectives?
   2. What are the major tasks?
   3. What is the timeline?
   4. What are the key milestones?
   5. Who is responsible?
9. Organizational Infrastructure
   1. How do we link the plan to the performance review process?
   2. How do we link the plan to the compensation process?
   3. How do we link the plan to the education & training process?
   4. How do we link the plan to the hiring and succession planning process?
   5. How do effectively communicate the plan objectives?