



# CAPACITY BUILDING SOLUTIONS, INC.

## Strategic Planning Outline

### Statement of Mission/Business:

- ▶ Asking the fundamental question that drives business success (Jim Collins: Built to Last and Good to Great)

### ① Core Ideology

- ▶ What is your core purpose?

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- ▶ What are your core values?

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### ② Hedgehog Theory

- ▶ What are you most passionate about?

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▶ What are you best at (better than your competitors)?

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▶ What is your economic denominator?

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## Success Visioning:

▶ What are the Critical Success Factors?

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▶ What does success look like 1, 3, and 5 years out?

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▶ What are the longer-term success objectives?

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## Key Assumptions:

▶ What are the key assumptions driving our business?

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▶ How would we rank these assumptions and their impact on our business?

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▶ What are assumptions that need to be further tested versus facts that require a response strategy?

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## SWOT Analysis:

▶ What is the plan for leveraging organizational strengths?

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▶ What is the plan for managing organizational weaknesses?

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▶ What is the plan for taking advantage of market opportunities?

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▶ What is the plan for responding to market threats? Where are we vulnerable?

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## Product and Service Analysis:

- ▶ How do each of the product and service areas compare against external market realities and financial performance issues?

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## Customer Analysis (Peter Drucker)

- ▶ Who are our customers?

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- ▶ How do we rank these customers regarding their value to our organization and their market potential?

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▶ What do our most important/target customers value?

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▶ What is our record to date in delivering value to these customer groups?

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▶ What is the plan to maintain and increase the value to these customers?

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▶ Goals, Strategies, and Measurement (Robert Kaplan: The Strategy-Focused Organization)

## ① **Balanced Scorecard Approach**

▶ What is the plan to maintain and increase the value to these customers?

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▶ What are the key Financial Goals, Strategies, and Measures?

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▶ What are the key Internal/Operational Goals, Strategies, and Measures?

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▶ What are the key Customer Impact Goals, Strategies, and Measures?

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▶ What are the key Learning Goals, Strategies, and Measures?

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## Accountability/Ownership

▶ What is our workplan to achieve key strategic objectives?

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▶ What are the major tasks?

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▶ What is the timeline?

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▶ What are the key milestones?

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▶ Who is responsible?

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## Organizational Infrastructure

▶ How do we link the plan to the performance review process?

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▶ How do we link the plan to the compensation process?

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▶ How do we link the plan to the education & training process?

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