



STRATEGIC PLANNING WORKBOOK



*Connor Business Resources LLC
Supporting Businesses with Online Education & Resources*



Strategic Planning...What is it?

Strategic planning helps you to pave the most direct path towards your vision; saving you time and resources.

It's a Roadmap that helps define your direction...



It helps you to set and measure Goals...



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There are a few parts of the Strategic Plan that need to be done prior to our meeting. Please fill in the appropriate sections and bring this workbook to our Strategic Planning Session.

The workbook is broken down into the following sections:

1. Long term financial goals
2. SWOT Analysis
 - a. Strength
 - b. Weakness
 - c. Opportunity
 - d. Threats
3. Core, Values and Beliefs
4. Purpose/Mission Statement
5. Ultimate Goal
6. Brand Promise
7. Elevator Pitch



Long Term Financial Goals

1. What year would you like to exit your business?

(sell, retire, give away, close) _____

a. If you are a non-profit - how many years would you like to project your revenues? (3,5,10)_____

2. What would you like the Sales/Revenues/Income to be the last year of your business or 3,5,10 years out? \$ _____

3. What was the Sales/Revenues/Income in the previous year? \$ _____

4. What is the planned Sales/Revenues/Income this year? \$ _____

5. What were the expenses for the previous year? \$ _____

6. What are the planned expenses this year? \$ _____

SWOT ANALYSIS



What are the strengths of your organization?

These are INTERNAL

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____



What are the weaknesses of your organization?

These are INTERNAL

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____



What are the opportunities for your organization?

These are EXTERNAL

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____



What are the threats for your organization?

These are EXTERNAL

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____



Core Values and Beliefs

What is the culture of your Company/Organization?

The “Should’s” and “Shouldn’t’s” that guide your organization’s Decisions, Attitudes, Behaviors and Performance. Should be 5-10 Commandments upon which your Vision for the future is built. It will be the basis for Selection, Performance Review Evaluations, Promotion, and Retention of Key Players going forward.

Ask yourself these questions:

“How do I conduct my business?”

“What makes our culture unique?”

These guide the attitudes, decisions, behaviors and performance of your whole organization.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____



Purpose/Mission Statement

Ask yourself these questions:

“Why are we doing what we’re doing?”

“Why does this Organization exist?”

“What is the reason we are in the business we’ve chosen?”

“What is our passion for this business?”



Ultimate Goal

When you think about your ultimate goal or dream, it should be 10-25 Years out; Will it make your organization Admired and Legendary; Challenge you to Greatness; and it must drive your Business Fundamentals. This is something that may take some time to figure out, so do not rush this process.

This applies to non-profits as well as a for profit organization.



Brand Promise

To identify your organization's Brand Promise, ask yourself these Questions:

- 1) "What specific Need can we best satisfy, better than any of our Competitors, for our customers?"
- 2) "What is our absolute Value-Added Proposition or Market Differentiator?"



Elevator Pitch

What you would say to a stranger to describe your company during a 15-second elevator ride?

“Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice, and discipline.”

— James C. Collins, *Good to Great: Why Some Companies Make the Leap... and Others Don't*.



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