

# Assess Position



# Identify Goals



# Make the Plan



# Execute & Realise



**Current Performance:**  
Analyse & evaluate current performance

**Industry & Market Data:**  
Analyse Competitor & Market opps & threats

**Customer Segmentation:**  
Identify most profitable & strategic customers

**Employee Input:** Determine strengths & weaknesses

**Competitive Advantage:**  
Identify your Unique Selling Proposition

**SWOT:** Summarise the Strengths, Weaknesses, Opportunities & Threats

**Analyses:** As needed e.g. BSc, PESTEL, 5 Forces, Value Chain, VRIO, Gap, etc

**Mission:** Determine your firm's core purpose

**Vision:** Imagine what success look like in 3-5 Years

**Values:** Identify your core cultural principles

**Identify Strategic Goals:**  
Develop a 3-year BSC of 4 or so balanced goals

**Set Objectives:** Develop a 3-year BSC of 12 or so balanced objectives

**Identify KPIs:** Define for each strategic goal & objective

**Forecast:** Prepare a high level 3-year financial projection

**Identify Growth Opps:**  
Customer, Marketing, Services, Markets etc

**Develop S&M Strategy:**  
Develop acquisition & retention strategy

**Prepare Action Plans:** Plan actions & prioritise strategic initiatives

**Manage Risk:** Identify & mitigate risks

**Embrace Tech:** Streamline operations & improve customer experience

**Cascade:** Align Goals, KPI & Actions with departments/individuals

**Budget:** Prepare 12-month budget

**Communicate:** Rollout strategy to all staff

**Review Progress:** Monitor implementation of action plans & related measures

**Monitor Financial Performance:** Review Actual v Plan v Forecast

**Monitor KPIs:** Review Performance

**Adapt:** Identify corrective actions to ensure plan is achieved

**Recognise:** Celebrate team & individual success

**Reward:** Provide timely financial incentives, bonuses & consider ESOP