DEVELOPING YOUR PLAN FOR GROWTH
Agenda

- About SGL
- Why Plan
- SGL Guide To Planning
- Contents of a Plan
- Case study
We provide a highly experienced strategic / financial manager that can work for as long as you require and as frequently as needed.

We engage with you, listen to your needs and help you hand pick the most relevant and accomplished expert from our extensive network.
How We Work...

**Step 1.**
We meet with you to understand what you need

**Step 2.**
We select from our highly experienced panel and present a number of options to you.

**Step 3.**
Once you have met and selected the SGL expert for you, we’ll agree the scope of the work
Business Planning
What is Strategy?

“What do you want to achieve or avoid? The answers to this question are objectives. How will you go about achieving your desire results? The answer to this you can call strategy.”

— William E. Rothschild
Why Plan?

“If you don't know where you are going, any road will get you there.”

Lewis Carroll

Wednesday - Oct 3, 2012 (2:58 pm)
So do you end up here...

“I told you to ask for directions but you were too proud to listen to me.”
Or here…
At is simplest Strategy is...

- Make sense
- Make choices
- Make it happen
- Make revisions

Compare initial assumptions with experience, explore gaps, and make mid-course corrections.

Ensure people make good promises and deliver on their commitments.

Develop a shared mental map of

Agree on clear priorities to guide action and resource allocation.
Question for You?

“If you don’t have time to do it right, what makes you think you’ll have time to do it over?”
— Seth Godin
The SGL Roadmap…

Vision

Strategy

Objectives

Critical Success Factors (CSFs)

Key Performance Indicators (KPI’s)

Actions

Systems & Processes

People & Culture

Finance

Marketing & Sales

Products & Services
Never Confuse Tactics with Strategy...

**Strategy vs. Tactics**

*Strategy without tactics is the slowest route to victory.*

*Tactics without strategy is the noise before defeat.*

– Sun Tzu
Steps – Vision to Execution ...

- Know Your Starting Point
- The External Environment
- SWOT Analysis
- Brain Storming
- Evaluation & Prioritisation
- Developing / Resourcing the Plan
- Execution
- Review
Know Your Starting Point…

- Does everyone know the vision?
- What are the ambition levels of key stakeholders?
- What are the Profitable customers / Products?
- Culture of your organisation
- What are the non value adding activities?
- Strength of the management team
The External Environment…

- Are there any opportunities / threats
- Competitor / Market Analysis
- PESTEL
  - Political
  - Economic
  - Social
  - Technology
  - Environmental
  - Legal
SWOT Analysis…

Holistic look at your business – that numbers alone won't tell you
Brainstorming…

Withhold your judgment of ideas

Encourage wild and exaggerated ideas

Headline your ideas – no wafling

Build on the ideas put forward by others

Quantity counts at this stage, not quality

Identify Ideas as:

Excellent - Definitely will work and Quick Win.

Interesting. - Needs more investigating. May work in the future.

Useless - Will not work.
<table>
<thead>
<tr>
<th>Idea/Area</th>
<th>Where we are Now</th>
<th>Barriers and Risks</th>
<th>Enablers and Opportunities</th>
<th>Organic or Accelerated</th>
<th>Resource Required</th>
<th>Return 3-5 Years</th>
<th>Agreed Ranking</th>
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NB – Don’t overdo the analysis
Developing / Resourcing the Plan…

- Financial modelling is key
- Agreeing the key assumptions
- Scenario planning
- Bottlenecks / limiting factors
- Prioritisation / phasing of projects
- Funding gap
- Quantification of benefits / ROI
Execution …

- The plan becomes the management tool
- Who loses sleep?
- What gets measured, gets managed…

**Gets done**

- Visibility and communication … and communication again
Remember...

“However beautiful the strategy, you should occasionally look at the results.”
Winston Churchill
Review...

- KPI Dashboard
- Re-calibrate the strategy
- Re-assess the vision
What to Include in your Business Plan
Should Include …

- Executive summary
- Company Description
- Market Analysis
- Marketing/Sales Strategy
- Research & Development
- Staffing and Operations
- Financial Projections
- Appendices
Company Description ...

- History
- Promoters, shareholders and Board
- Advisors
- Products and services
- Long Term Aim of Business
- Objectives
Market Analysis ...

- Target market
- Total market valuation
- Targeted share
- Market trends
- Profile of competitors
- Competitive advantage
- Benefits to clients
Marketing/Sales Strategy ...

- Income sources
- Marketing strategy
- Pricing
- Advertising and Promotion
- Sales Strategy
- Route to Market
Research & Development ...

- Patents, copyrights and brands
- Product/Service Development
- R&D projects underway
- Project prioritisation and selection
Staffing and Operations ...

- Management Organisation Charts
- Division of Roles
- Staffing
- Training Plans
- Operations
Financial Projections...

- Key Assumptions
- Summary Financial information
- Profit and Loss Accounts
- Balance Sheets
- Cashflow Projections
- Sales Pipeline
- Funding requirements
Contact Details…

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How Do We Get There?
Developing the Plan

- Identify the Goals and Objectives
- Identify the Critical Success Factors
- Match the Critical Success Factors to the Objectives
  - Supported by ranking from SWOT Framework
- Identify Solutions that can/will achieve the Objectives
  - Multiple solutions need to be evaluated
  - Balance to be struck between risk, resource, and return
- Aggregate the strategies to build the frame of a plan
- Revisit and re-calibrate SWOT Evaluation framework
Establish Vision with CEO & Board

- Briefing on Current Plans, Status and Company History
- Identify what can be achieved organically
- Identify what can be achieved with extra resource in next 3-5 years
- Expected Return on Investment of accelerated activities
- Identify key objectives to achieve the vision
- Sketch out a high level roadmap to achieve the objectives
- Identify resource gaps
- Agree steps from now to execution
- Agree initial presentation to management team and arrange team meeting
Management Team Briefing

- Present to Management Team
- Explanation of focus on Return on investment
- Initial Discussion and Feedback
- Outline of the planning process
- Request to Reflect and Ideate How to Help Achieve the Vision
- Schedule Brainstorming Meeting
- Routine Management Team Meetings will run in Parallel - BAU
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"Sound strategy starts with having the right goal."
— Michael Porter

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