

PLAN GENIE BUSINESS TRAINER



YOUR ROADMAP TO A HEALTHY & HAPPY BUSINESS, USING THE MAGIC OF PLANNING

BRIAN GARDINER NATRISHA SAGRIS



THE
**PLAN
GENIE**

**BUSINESS
TRAINER**

Instructional Workbook

Brian Gardiner & Natrisha Sagris

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Business Magic

There is something magical about goal setting. Most of us have experienced this at various times in our lives. We've made a list of personal or business goals, shared this with people around us, and we find that most, or all, of the things we wanted to achieve have shown up in our lives six months or a year later.

Thinking about goals is the starting point but it is when we write our goals down that the magic happens. When you transfer your goals to paper, you convert a vague notion bouncing around in your brain into a more tangible, concrete, and specific result you want to achieve. In this action, you make a conscious thought change that starts to automatically change your behavior.

Experinece this business magic as you document your thoughts, ideas and aspirations for your company with [Plan Genie](#).

The Magic of Plan Genie

Plan Genie is designed in a workbook format. In each of the five steps of your plan, you will find thought-provoking questions for you to answer in the accompanying worksheets. Your answers form the content of your written plan. If you purchase the annual subscription, you have access to the web-based version of the workbook. As you complete the workbook online, [Plan Genie](#) will collate your answers into a cohesive written plan in a PDF.

The web version has a simple navigation bar that makes it easy to move around your plan. As you make a change in one section, this often triggers a change in another section of your plan. You can print your **Business Plan Summary**, or your **Complete Business Plan** at any time by scrolling to the bottom of the navigation bar on the right, to the "Download and Print" button.

We think you will enjoy the convenience of the web-based version of [Plan Genie](#) as it allows you to make changes to your plan "on the fly" from most devices, so you always have a current version of your plan to discuss and share with others

Need More Help?

Many people get better results in the gym when they work with a trainer or coach. *The same principal applies here.* We recommend you consider working with a business coach to help get you started and to hold you accountable for sticking with the process. For smaller companies, another option is to work with a friend or colleague and "buddy-up" to work on your plans.

You can reach us by email at any time for further assistance: info@plangenie.com

Note: Plan Genie offers a training program and other support for business coaches.





YOUR ROAD-MAP TO A HEALTHY AND HAPPY BUSINESS

CHAPTER 1

Chapter 1: INTRODUCTION

Harness the magic of a grocery list to run your business.

Your weekly trip to the supermarket works better when you prepare a list – you save time and money - less wandering, buy only what you need and can afford, fewer return trips to pick up something you forgot. Imagine the impact on your business and your personal time if you applied this grocery list approach to running your company.

Companies that DOCUMENT a clear picture of the future direction of their business increase their odds of success by 30-50%!

www.theglobeandmail.com/report-on-business/careers/leadership-lab/why-would-you-not-have-a-business-plan/article29938400

Of course, running a business is more complicated than your weekly trip to the supermarket. *Plan Genie* will show you how to leverage the power of a grocery list to produce extraordinary results for your business

Planning Your Business

There are endless tips and advice on how to run a successful business, but the skill of **planning** is a constant among all the other variables. It is the platform upon which all the other pieces can be added and expanded over time.

Planning is a natural human behaviour. Virtually everything we do in life starts with a plan – a walk in the park, our morning commute, or the weekly trip to the supermarket. These plans are formulated in our brains quickly and easily. Because they are simple tasks, we rarely need to write them down.

A simple example of a documented plan is making a grocery list before you set off to the supermarket. When you work from a list, your probability of success goes up – less time wandering the aisles, buy only what you need, don't forget something so you avoid making a return trip. Once you have composed your list it's easy to delegate the execution of these tasks. The same is true in business. When you work from a documented plan (your grocery list), it's easier to prioritize tasks and delegate.

If we accept the premise that working from a written plan will significantly improve your chances of success, *why do so few small-to-medium size business (SMB) leaders rarely do this work, or do it well?* Firstly, running a business is significantly more complicated than a weekly trip to the grocer, and when we look more closely there are several challenges that get in the way of good planning in business:

- ◆ How do I do this work quickly and efficiently and in a format that I can easily revise as my situation changes?
- ◆ Most entrepreneurs do not want to feel constrained by outdated plans. They need agility in decision making.
- ◆ It might be a fear of failure. Planning requires the business leader to make difficult decisions; sorting through a myriad of options and selecting the best way forward. How will I look and feel if we don't reach our goals?
- ◆ Some have had a poor experience with planning efforts in the past. They point to a voluminous document that became a dust collector a few weeks after the planning sessions.
- ◆ Then there's the cost of consultants or facilitators, cost of lost productive time for offsite planning retreats, or risk of becoming reliant on the consultant to manage the process going forward.

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Many SMB owners are simply more comfortable working *in* the business rather than *on* the business. They much prefer to meet with clients or new prospects than to pause long enough to plan the way ahead.

This book will guide you on how to be an effective planner and, in the process, leave you with a deeper understanding of the key components of every business and how these components interact and interconnect in real life situations. We take the complication out of this work and make it easy for any business leader to develop an initial working plan for the business and maintain a planning process over time.



To create a coherent plan, you need to have a full grasp of your current situation and the challenges you face - a clear picture of where you are now, where you want to go, and how you intend to get there. Using the analogy of a *business leader* with the role of the *captain of a ship*, what is the most important responsibility of the ship's captain before setting sail? Clearly, the captain needs to know the destination for the journey and have plotted the course. Imagine signing on as a crew member of a vessel where the captain is either incapable or unwilling to do this important work.

"Where is our company headed, Captain?"

"I'm not sure, and when I figure that out, I probably won't tell you?"

... hardly an ideal situation to sign on as a new employee, or to engender loyalty from the crew.

Clarity Creates Confidence ... a simple and powerful idea. These three words capture why your written plan is so important. Put another way, lack of clarity creates confusion and uncertainty. Without a clearly written plan you are asking your employees to work in a constant state of confusion and uncertainty, which adds to frustration both for them and your leadership team.

Clarity Creates Confidence is easy to say and easy to understand, but not so easy to accomplish. In every business, the pursuit of clarity starts with the first draft of your plan and improves with each new update and revision.

Put in this context:

Running a business without a documented plan is simply not an option.

The real and tangible value of developing a planning habit in your business will become apparent in as little as a few months. The process of taking ideas from your head and laying them out in an organized document not only creates clarity, but spreads the workload, and relieves stress. When you become clear about what you are attempting to accomplish, it becomes more apparent what steps need to be taken to achieve the outcome. Your entire team can align their efforts with yours, and you move ahead more quickly together. You, and they, learn how to invest your capital more wisely, and on a timely basis. When your team is fully engaged and pulling your business forward, you will sleep better at night, knowing you are not alone in this journey.

The Covid 19 pandemic precipitated a shift to a *work-from-home* environment. This "results-focused work environment" magnifies the need for clear and well communicated plans at the corporate, department and individual level. In the absence of this clarity of direction, remote work is both challenging and stressful.

Documenting a plan for a business raises more questions:

- ◆ What information should be included in the plan, what not to include?
- ◆ Where to start?
- ◆ What should I tackle myself and what should I delegate?
- ◆ How to involve and engage your leadership team, and the rest of your employees?
- ◆ When and how often does the plan get revised?
- ◆ What tools are available to help track and document your plans?



Lewis Carol in *Alice in Wonderland* said it best:

One day Alice came to a fork in the road
and saw a Cheshire cat in a tree.
"Which road do I take?" she asked.
"Where do you want to go?" was his response.
"I don't know." said Alice.
"Then it doesn't matter." replied the cat.

There are many impediments that get in the way of effective planning for SMB leaders. This book will help you get past these impediments. You will learn the relevant parts of a business and how these elements work together. With practice, you can acquire a skill at planning that will serve you for the duration of your business career.

In business, if you don't know where you want to go, you run the risk of following the wrong path, leading to poor, sometimes, disastrous results. If your employees do not know where you want to go, they may also do down the wrong path.

THERE IS MORE TO LIFE THAN BUSINESS.

If planning can help you succeed in business, and save you time and money grocery shopping, what could happen if you apply this same discipline to your personal life?



I spent fourteen years as the Chair of a CEO peer group with The Executive Committee (tec-canada.com). This group of high performing individuals, each running companies in different industries, met monthly for a full day to learn from, and support each other through the trials and tribulations of growing their business. Our purpose was to **increase the effectiveness and enhance the lives of our group members**. Over the course of time, as our group matured, it became increasingly obvious that we were particularly good at solving business problems, but rarely put this same energy into improving our personal lives. Eventually we realized that personal life planning takes priority over business planning. While the main purpose of this book is a "how to" guide for running a business, we added a chapter to help you apply this same principle to your personal life planning.

5 STEP DOCUMENTED PLAN



This workbook will guide you through
5 steps to document your plan



CHAPTER 2

Chapter 2: THE COMPONENTS OF A BUSINESS *The Plan Genie Method*

Over many years as a Chair of a CEO peer group, I was afforded a unique window on how business leaders ran their companies. Our group of twelve CEOs of medium sized companies, all in different industries, met monthly for a “think tank” day. Most of our sessions also included half-day workshops led by resource experts from across North America. Over the course of 14 years, we dissected and examined hundreds of business and personal issues, challenges, and opportunities raised by the members. These candid and in-depth discussions were real-time business case studies.

Each resource speaker added to our depth of understanding within their field of expertise. After a few years, I began to see patterns, and structure to business that previously seemed overly complicated and incoherent to me.

I've always had an abiding interest in planning but struggled to find a useful tool or format that would make planning for a business easy and even a fun activity for business leaders. The internet had plenty of tools and templates for writing a business plan, primarily for the purpose of raising capital. However, these formats were not very practical for planning the ongoing, day-to-day running of a business and keeping the plan current over time. They were more suited to documenting a “business case” for raising capital than plotting the way forward for an operating company.

To document a working plan for a business, we needed to understand the component parts of a plan. With the help of one of the members of my CEO group, we built a structure (*diagram left*) for documenting a comprehensive plan for any business—large or small, old or new, in any industry.

There are five sections (or *steps*) in the structure, each connected and interrelated to the other. The first two elements, ***The Plan Summary*** and ***Values***, are leadership level tasks. The next two elements, ***Where We are Now***, and ***Action Plans by Department***, require participation from lower-level teams or departments as you add more detail to your plans.

Once the initial draft of your plan is completed, Step 5 looks at your ***Organization Structure***, current and future, to help you align your resources, people, and capital to support the work that needs to be done.

In following chapters, we will discuss the content of each section and offer tips on how to complete these steps.

At it's simplest, there are three steps to every plan:

Step 1: What is the destination? (goal, outcome, objective)

Step 2: What is the starting point

Step 3: Plot the course

You can see this process in action the next time you use your GPS to get directions. Punch in your desired destination, your current location and your application will plot your optimal route (Action Plan)—A great reminder that Action Plans become clear when we know our destination.

Where do Budgets fit?

The financial side of planning typically includes budget forecasts for:

- ✓ Revenue and expenses
- ✓ Balance sheet
- ✓ Cash flow
- ✓ Capital investments needed for the business to perform on its plan.

Many companies create an annual budget and call this their “business plan.” Budgets are an important piece of your plan as they expand your financial goals into a detailed format - monthly, quarterly, annual targets for revenue and expenses, and cash flow targets.

It’s important to recognize that the narrative plan leads this process. Without the narrative plan, you lack context to make financial projections, other than repeating last year’s numbers and fudging an arbitrary growth factor. Tracking and documenting financial results is critically important to running your business. This data informs your decisions as you execute on your plan and make mid-course adjustments throughout the year.

In *Plan Genie*, we focus exclusively on the narrative part of a plan. There are numerous tools on the internet and accounting professionals to help you with financial projections once you have the narrative story in place. We will look at this topic in more detail in Chapter 14, the Action Plans sections, Step 4.

CHAPTER 3

Chapter 3: The Planning Process

The biggest problem with written plans is their short shelf-life. Planning is an exercise of making decisions about our future based on the data we have today. The world around us is constantly changing, so our plans need to change. Once we recognize this fact it becomes obvious that planning is a continuous process, it is not an annual event. Your plan is a living document.

When, Who and How Often?

In normal circumstances, the stale-date for your company plans is about 90 days. The clear action plans laid out 3 months ago will start to become blurred and unclear. It's time to hit pause and reset. Special circumstances may interrupt this cycle and suggest an earlier or later review. The 2020 COVID-19 global pandemic, for instance, required business owners to make these important planning decisions initially daily, then weekly. As the impact of this pandemic "storm" began to stabilize, companies were able to return to a more routine planning schedule.

Businesses can be impacted by a variety of major disruptions from time to time. Leaders who maintain a clear focus on both short- and long-term results during unusual and unanticipated disruptions generally fare better through these periods than those that revert to reactive mode.

The scheduling of your planning cycle may also be affected by your fiscal year-end or the seasonality of your business. The key to having an effective planning process is in selecting a planning cycle that works for you and your team, then fixing these dates in your corporate calendar. Ask everyone on your team to clear their calendars for these meetings, and don't change them.

Planning in business is a collaborative process. When your team is invited to contribute their thoughts and ideas to overcoming the challenges and exploring the opportunities that lay ahead, they become fully engaged in the work. They will begin to see more clearly how their personal success is congruent with the business success. The goal is to have everyone in the company supporting each other, all pulling in the same direction.

The structure outlined in the previous chapter will help you decide who to include in each of the 5 steps/sections of the plan. Step 1 (*The Plan Summary*), and Step 2 (*Values*) will involve the leadership team. As you move into more detail in Step 3 (*Where We are Now*) and Step 4 (*Action Plans by Department*) you can begin to cascade the planning process deeper into the company. Step 5 (*Aligning your resources*) is, again, a leadership responsibility.

Getting Started

If planning and collaboration with your employees is not a current practice in your business, you may find some resistance getting started. There are several things you can do to get over this initial hurdle.

- ✓ Start with an open discussion about why it is important to have a written plan for the business, explaining the component parts and how the process works, and ensuring that everyone understands this is not a one-time event. Indicate your long term commitment to the planning process.
- ✓ Take small steps to build your plan over a series of meetings. It may take a few quarters of practice before all the sections of your plan get attention.

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- ✓ Begin with the *Plan Summary*. You could tackle all five parts of the summary in a single meeting, or work through one or two topics from this section at your first meeting.
- ✓ A good starting exercise is to create a list of **Critical Impediments**. Brainstorm a list of every current critical issue, problem, and challenge that may impede the accomplishment of your overall goals and objectives. Capture these ideas in 3–4-word bullet points on a flip chart. As this information is verbalized and recorded, your group will transition from worrying about the challenges ahead to opening their minds on how to overcome these challenges.

Note: You can do this Critical Impediments exercise at any time, as you already have a plan for your business - in your head - The real work of planning is in the documentation so your plan can be understood and shared with others.

- ✓ Use the *Plan Genie* workbook to create your plan, or tailor it to fit your specific business. The end game here is to pull the collective ideas from you and your team into a coherent document for reference and revision over time.

Keep it simple and try to avoid business jargon as much as possible.

*This is about understanding where you are today,
where you want to go, and what you need to do to get there.*



CHAPTER 4

Chapter 4: The Plan Summary

The Foundation

Building any structure starts with a solid foundation. The same is true of your business plan. The foundation for your plan is the **PLAN SUMMARY**. Your plan summary contains five important pieces of information. The rest of your plan extends from this foundation and is easier to assemble when you have this document clearly written.

The five pieces of your summary are:

1. Your **Unique Business Proposition** – a short description of what makes your company special, unique, and different? What makes your company remarkable?
2. The **Purpose** of your business - Why does your company exist, **as seen from the customer's perspective?** At a core level, what fundamental value or benefit does your company create for your customers?
3. Your **Destination** - Your long-term goals, your picture of success 3 years from now.
4. Your **One Year Goals** - Desired outcomes in the next 12 months.
5. Your **Strategy** - In broad terms, how you will achieve these results?

Unique Business Proposition

What makes you special? Has a prospective client ever asked you this question? Even if they haven't directly asked, at some level, this question is on their mind as they consider their buying decision. What is your answer? Do you have a clear, succinct response that gets to the core of what is special, unique, or different about your company? If you ask this question to your leadership team, how consistent is the answer? What answer would you get from your marketing and sales team, your operations team, your finance team, your front-line staff, your forklift driver, your business partners? Most importantly, *what do your customers say about your company?* When documenting your working plan, this is one of the first questions to address. What is your **Unique Business Proposition (UBP)**?

In much the same way that we are each different as individuals, every business is different and unique. Discovering what makes your company unique will clarify your market focus and put you on the path to attracting, recruiting, and retaining your best customers while simultaneously releasing, either through attrition or bold decisions, your worst customers. It also sets the framework for doing the same with your employees: Hiring the best and exiting those that don't fit.



Becoming clear about what makes your business UNIQUE will guide the direction of your business and provide a reference for key strategic decisions as you grow into the future.

A Few Tips to Help Find Your UBP

Answer these questions in a sentence or two, to help you determine your **UBP** (*Unique Business Proposition*): **What, How, Who, Where**. These may seem like simple question at first, with obvious and widely understood answers. You might be surprised at how diverse and challenging these thought-provoking questions can be.

- ✓ **What** does your company do? Is there something special, unique, or different about what your company does?

- ✓ **How** you do it? Is there something special, unique, or different about how you do what you do?

- ✓ **Who** are you? Is there something special, unique, or different about you and your team or your culture?

- ✓ **Where** do you operate? Where is your geographic reach?

Somewhere in this mix you will find a starting point in your search for your unique identity.

Our Unique Business Proposition:

Get input

- ✓ Talk to your best customers. Ask why they became customers and why they stay. Listen very, very carefully.
- ✓ Another great source of insight are your business partners—your suppliers, and/or your distributors.
- ✓ Finally, get your whole team involved, from the executive level to the front line. Harness the power of collaboration within your company.

Once you have your first draft you can review and tweak it at each planning review. This is a dynamic exercise. How you described your UBP three years ago will be different today and may be different three years from now.

Your Purpose

Every business has a purpose. What is yours? **Why** does your company exist, **as seen from the customer's perspective?**



*If your business is building lighthouses,
what might your PURPOSE be?*

*Something like: "We protect our
customers from danger at sea."*

Here are a few examples:

Bike Rental Company

The Purpose statement of a bike rental company doing business near a large urban seaside park reads like this:

Our Purpose is to provide our customers with a unique outdoor experience—spectacular scenery, sounds, movement, activity, education, and nature at its best—a sense of well being and a chance to recapture part of youth that can be shared with family and friends of all ages and physical abilities. This experience is facilitated and enhanced through our commitment to customer service and quality products.

With this “Purpose” in mind, the young, part-time summer staff can get excited about helping tourists and locals alike “enjoy a unique outdoor experience” and it becomes more than just a summer job renting bikes.

A drill bit company:
“Perfect holes every time.”

A mediation and conflict resolution company :
“We turn conflict into opportunity.”

Gap International

Pontish Yeramyan, CEO of Gap International (gapinternationa.com), wrote about being purposeful:

The 21st Century Organization can also differentiate itself by operating within a bigger context than a vision or mission, something more expansive. It's not enough anymore to simply have a clear direction – people must be able to throw their entire selves into the game to be successful, with full engagement of heart and mind. We have found that when leaders leverage Purpose, it creates a competitive advantage that's difficult or even impossible to replicate. Purpose creates the ability for people to care about something much bigger than their personal concerns and fully apply their talent to meaningful endeavours.

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If you think about it, Being Purposeful creates the platform for organization success, because it taps into a reservoir of potential energy latent within the organization. When peoples' orientation to their job transforms from performing work to that of making a difference, they become exponentially more effective at coming together to produce extraordinary results. It becomes possible to consistently produce results beyond what is predictable in the normal flow of business. Powerful strategies can be created and re-created when purpose is present.

Purpose gives people a far more expansive space to create and grow, where creative, purpose-based thinking replaces crisis-based, fire fighting thinking. An organization of people who have connected themselves to something bigger can thrive rather than simply survive—they can move fast together and nimbly adjust strategies and tactics to succeed.

Purpose

Why you do what you do? What core problem do you solve or fundamental need do you fulfill, for your customers?

Eg. Drill bit company, purpose: "perfect holes every time"

Mediation company, purpose: "we turn conflict into opportunity"

Bike rental shop, purpose: "a unique outdoor experience..."

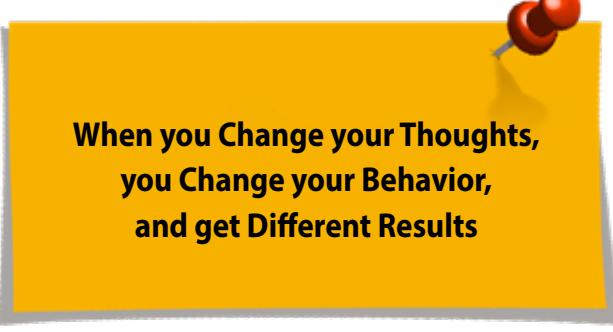
Once you have draft versions of your Unique Business Proposition and Purpose statement, it's time to do some goal setting. Here's the good news: Unlike a physical foundation, you can come back and revise these sections of your plan if you aren't completely satisfied with your initial efforts.

DESTINATION/GOAL SETTING: Use the Power of Positive Thinking in Your Business Plan

There is something magical about goal setting. Most of us have experienced this at various times in our lives. We've made a list of personal or business goals, shared this with people around us, and we find that most (or all) of the things we wanted to achieve have shown up in our lives six months or a year later.

A resource speaker in my CEO peer group, Mary Lore (managingthought.com), taught us about the power of our thoughts. In summary, her message was this:





When you Change your Thoughts,
you Change your Behavior,
and get Different Results

Expressed another way: *It's about the power of positive thinking.*

Thinking about goals is the starting point but it is when you write your goals down that the magic happens. When you write your goals down, you are required to convert a vague notion bouncing around in your brain into a more tangible, concrete, and specific result you want to achieve. In doing so, you make a conscious thought change that starts to automatically change your behavior.

As a leader, goal setting starts with you. Once you get clear about your three-year goals (we call your **Destination**) and **one-year goals**, it's time to get these same thoughts firmly imbedded in the minds of the leadership team, and in due course, throughout the company. This leads to changing behaviours throughout the company, and before long, better results.

Goal setting sounds like an easy task, and in many ways it is. In its simplest form, it is a list of outcomes/results for your business at a future date. In business, we have so many ideas and options to consider, it can be a challenge to create a short list that is clear, concise, specific (*quantifiable*) and realistic. One of the nice things about plans is that we are free to make changes as we move along into the future. *So, go ahead and make a list!*

Try this approach:

Write a date down at a point three years in the future, then describe 5 to 10 results that would make you happy—your definition of success at that time in the future. Be liberal in your thinking. At this stage quantity is more important than quality. For your financial goals, consider income, balance sheet, and cash flow outcomes, but don't limit your thinking to financial outcomes only.

To help set financial goals, start with a review of the past 2-5 years numbers, if you have them. Be realistic in your expectations of future results. When setting your revenue targets, it is critical to have the accompanying profit improvement goals. Pushing only for revenue growth in the absence of profit targets is a recipe for disaster.

Other goals may involve more stable cash flow, greater or lesser leverage of your equity in the business, changes to your culture, people development, geographic expansion, product innovations, acquisitions, or any goal that would make you personally happy as the CEO three years from now.

Understanding the relationship between goals and strategies.

The next step is to cull the list down to a more manageable 3-5 solid results and start to distinguish between a goal vs. an action step, which we label **Strategies** in your Plan Summary. Most initial goal setting lists will contain a mixture of *measurable outcomes* along with future action items, your *to-do* list. Most of us tend to think first about the things we need to get done. That's natural, and a good place to start your list. Once you have a list, ask: *Is this something we need to get done, or is it a measurable outcome?* Float your *measurable outcome* goal list of 3-5 items to the top, and leave the remainder as an initial strategy list. (See *Destination*, *One Year Goals*, and *Strategy* worksheets that follow.)



A NOTE ABOUT GOAL SETTING

Goal setting can be both fun and challenging. There are many ways to do this.

Here are a couple of exercises to help you get started.

- ✓ Start with your three wishes. If you could ask your genie with the magic lamp for the three wishes you want most for your business, what would they be?
- ✓ Think about the future in terms of possibilities. What results do you think are possible in three years?
- ✓ Cameron Herald in his book, *Double, Double* (www.cameronherald.com), recommends doing a painted picture exercise. This will help you add more detail, a very important step in clarifying your goals.
- ✓ What about a **big hairy audacious goal?** What does that look like for your company?
- ✓ We suggest a 3 year horizon for your long term goals. Three years is far enough out to let you dream a little, yet close enough keep you grounded in reality.

One-Year Goals

With an emerging picture of your 3-year goals, you can focus on your immediate future—**One-Year Goals**. What does success look like one year from now? What are the milestones you need to reach for this coming year? These one-year goals will often be a subset of your 3-year goals, along with some other items you want to accomplish in the shorter term.

Strategy

Now that you have a first draft of your long-term and short-term goals, you can turn your attention to the major action items, or **strategies**, necessary to achieve the outcomes you've set. As noted above, if your goal lists are longer than 4-5 items, I suggest you move items related to work you want to get done to this strategy section. If you are working with the online version of *Plan Genie*, use "cut and paste" to move items between these sections

We use the word *strategies* to describe the “big picture” things you need to focus on. This list is typically about 8-15 major action items or projects contemplated for the next 12 - 36 months. **The Action Steps**, Part IV of your plan, will help expand detail for the items in this section. The 90-day action steps are the key to sustained execution over time.

You will find your Plan Summary to be the most useful communication tool available for running your business. It captures the essence of the business and sets the foundation for planning the details, and it will give you a deeper understanding of your business. Don't worry about getting it perfect on the first try. It will evolve over time.

I like a quote from Mark Twain in a letter to a friend. He starts the letter with, “Please accept my apologies for the length of this letter, I would have written a shorter one, but I didn’t have time.” Your narrative business plan will get clearer and shorter, as you and your team return to this document each quarter.

Note: We use the structure of **3-Year Goals, 1-Year Goals** and **Strategies** to help clarify your thinking. Each time you review and revise your Business Plan Summary, these ideas will become clearer, and priorities reset. In the short-term, don't be too concerned about the semantics, (*goals* or *strategies*). Just make your lists then get on with getting the work done.

THREE-YEAR GOALS

What is your picture of success for the next 3-years (36 mos)?

List 3-5 major goals for the next 3 years: *(be specific)*

Goal #1: _____

Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

ONE-YEAR GOALS

What is your picture of success for the next year (12 mos)?

List 3-5 major goals for the next year: *(be specific)*

These will be interim results (milestones), related to the 3-year outcomes listed in the preceding worksheet.

Goal #1: _____

Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

STRATEGIES

Write your strategies.

Define a long-term plan of action designed to achieve **EACH** goal you listed.

Describe how the company will achieve each goal in broad terms. What are the major strategic elements that, combined and implemented over the next 12-36 months, will move the company successfully towards its goals?

TIP: Start with the one thing that has to be done extraordinarily well to achieve your destination.

List at least one strategy for Goal #1:

List at least one strategy for Goal #2:

List at least one strategy for Goal #3:

List at least one strategy for Goal #4:

List at least one strategy for Goal #5:

Congratulations! You now have a written plan for your business—a document that describes your business, and outlines the direction you intend to pursue. At a high level, you now have a road map for the future. As you review this document with your team each quarter, you (and they), will see progress and greater clarity with each revision.

The next chapters will guide you through the steps to engage your team as you roll out your plan throughout the company.

CHAPTER 5

Chapter 5: Values and Culture



Values or Culture—which comes first? It's a "chicken or egg" question.

What is *company culture*? *Company culture* refers to the attitudes and behaviours of a company and its employees. It is evident in the way an organization's people interact with each other, with your customers, and their unsupervised decisions they make.

Culture is a word for the *way of life* of groups of people, meaning *the way they do things*. It is often described as a "feeling" we get when we work or interact with certain organizations. All organizations have their unique culture, and your company culture can affect the success or failure of your business. Developing a culture that fosters success for all stakeholders helps ensure the best possible outcomes for your organization. If *culture* is the "chicken" in this story, then *values* is the "egg." Culture is the product of many things, but mostly influenced by the **values you practice and embrace**. A CEO colleague describes the values for his company as "the rules of the village."

The values you practice in your business can attract, or repel, three important audiences: Customers, Employees, and Business Partners (suppliers and/or distributors). Clearly defined and rigorously practiced core values set your company up for success. They help employees make many day-to-day decisions without seeking permission. They create a freeing and engaging working environment. When these positive behavioural traits are consistently practiced in all customer contacts, partner relationships, and employee interactions, it can have a profound impact on your long-term success.

People prefer to do business and work with people and companies they trust, who enquire about and understand their needs, who are reliable and do what they say they will do. These traits are examples of behaviours that reflect the values of these companies.

How do you create and evolve your culture?

So how do you change the culture of your business to support long term success? This is where the idea of Values comes into the picture. When you define values in the form of specific behaviours, you then have the framework to change behaviors over time.

The CEO's ethical standards give rise to the corporate culture. To state the reverse, the organization's values and ethical standards reflect those of the CEO, the individual with the most authority and power in the organization. Creating company values has traditionally been a top-down exercise. This makes the task of creating a Values document relatively easy and quick. However, getting widespread buy-in by the employees is more challenging and time consuming, and often falls by the wayside.

In many organizations, the *Company Core Values* poster is placed on the wall in the lunchroom, the entry lobby, and web site, but the underlying behaviours are not clearly defined nor practiced in any meaningful way. The values of the founder and current leadership are already "baked-into" the existing culture of the company. While it is important to capture and retain these attributes as a starting point, change occurs when you build on this base information through collaboration

We may not be consciously aware of the **values** of these companies, but if we pay close attention, they are observable in the behaviours and appearance of the employees and the physical appearance of the premises.

with your employees. This consultation process takes a little longer at the front end but the return on the investment is in earlier and more sustainable buy-in.

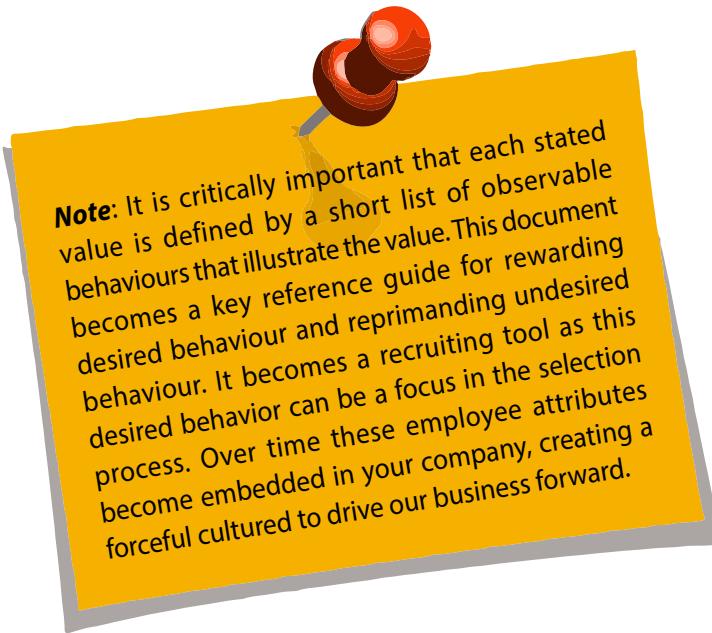
Below are a few questions to open the discussion with your staff about the idea and importance of personal and company values. The intent is to expand and clarify a draft **values statement** so that it is complete and understandable for everyone in the company. These questions* will generate a list of desired behaviours, physical attributes, and general beliefs that you can later organize into a coherent document for final review and revision.

- ✓ What behaviours and attributes do you value in a team member?
- ✓ What are the positive things your team members do to make this a better place to work?
- ✓ Think about your best manager. What are the characteristics about that person that sets him/her apart?
- ✓ When you have a tough problem to solve, what are the things that are helpful to the process?
- ✓ What do you value in companies and organizations that you do business with as a customer? (Desired behaviours, physical appearance, or general beliefs that you have observed)
- ✓ What are the positive things we do to bring value to your customers?
- ✓ What do you value in your best business partners? (suppliers/distributors)
- ✓ What are the positive things your best business partners do that sets them apart?

Once you have a list, find someone on your team who is good at synthesizing information to organize into categories and tidy up the language. You may end up with 3-5 key values. It is important that each value is then defined by a list of observable behaviours.

Examples

Stated Value	Definition (<i>Observable behaviours that illustrate the attribute</i>)
Reliability and Courtesy	<p>Which means that we earn trust from your customers, your business partners and our colleagues by being reliable and courteous in all things we do:</p> <ul style="list-style-type: none"> ✓ We show up on time. ✓ We do what we say. ✓ We finish what we start. ✓ We say please and thank you.
Teamwork and Collaboration	<p>Which means :</p> <ul style="list-style-type: none"> ✓ We put the performance of the team ahead of individuals. ✓ We will advise, consult, or collaborate across departments to improve decision making whenever practical to do so.
Open and Transparent Communication	<p>Which means :</p> <ul style="list-style-type: none"> ✓ We share information openly and frequently throughout the company. ✓ Sensitive information is shared by request and in appropriate circumstances. ✓ We trust our employees to maintain confidentiality of corporate and personal information.



Note: It is critically important that each stated value is defined by a short list of observable behaviours that illustrate the value. This document becomes a key reference guide for rewarding desired behaviour and reprimanding undesired behaviour. It becomes a recruiting tool as this desired behavior can be a focus in the selection process. Over time these employee attributes become embedded in your company, creating a forceful culture to drive our business forward.

When your whole team is engaged in designing this document, you should soon see individuals at all levels of the company start to hold each other accountable to behaviour standards they had a hand in creating. In larger companies you may experience sub-cultures within departments or work groups. This collaborative approach to clarifying desired behaviours throughout the company will help identify these anomalies and lead to corrective action.

Once you are satisfied with your first draft of *Company Values*, put it in your *Plan Genie* Plan (Step 2), for future reference and revision.

*Special thanks to Tom Foster for initiating some of the ideas expressed in this chapter. www.fosterlearning.org

WRITE YOUR COMPANY VALUES - BE SPECIFIC!

Tip: Start with a list of specific behaviours , then craft a value statement that captures the general concept. Move back and forth from the specific to the general until you have a clear document.

Value: _____

Which means that: (describe specific behaviours that demonstrate the value statement)

Value: _____

Which means that: (describe specific behaviours that demonstrate the value statement)

Value: _____

Which means that: (describe specific behaviours that demonstrate the value statement)



CHAPTER 6

Chapter 6: Where You Are Now?



A snapshot of key pieces of your business:

- ✓ *What you sell – products and services, fees*
- ✓ *Who you sell to - description of your target market, customer segmentation.*
- ✓ *Partners, Alliances, and Influencers*
- ✓ *Competitors*

Every journey has a starting point. We need to know where we are now to plot the way forward. Using the shopping analogy, we need to take stock in the kitchen before we make our shopping list (our documented plan) – check the fridge, the pantry, contemplate meal requirements for the next week.

In business, there are four useful pieces of information that provides a snapshot of the starting point for your plan:

1. A description of the current **Products and Services** you offer, and what the current fees are?
2. A description of your **Target Customers**?
3. A description of your **Partners, Alliances, and Influencers**?
4. An assessment of your **Competitors**?

The first two, your products and services and your target audience, are interrelated and need to be considered together. Documenting these two important pieces of information serves several purposes.

Products and Services

Clearly defining your products and services sets the stage for thoughtful and managed changes going forward. What changes to your **products and services** do you need to make to better meet the needs of your customers?

- ✓ What products or services are missing that your customers need?
- ✓ What products or services are you offering that your customers no longer require?
- ✓ Can you convert a product into a service, or a service into a product?
- ✓ Which products or services are most profitable, least profitable?

How closely do your fees align with the value you provide? Consider value based pricing vs. cost plus model. What fee changes can you make that would be acceptable to your customers and lead to greater profitability for the company?

Target Market

Similarly, defining the **criteria for your ideal customer** gives you a starting point to make changes. Are you focussing your efforts on the appropriate audience? Are there new markets that could benefit from your offerings?

Setting clear criteria to define your ideal customer focuses your efforts on the appropriate audience. It will help you assess the best way to communicate with your audience, your best “routes to market”

Engage your team

This information forms the reference point and useful content for your departmental action plans which is discussed in Section IV of your plan (Departmental Action Plans). A small investment of time keeping this section current will save countless hours of effort in the quarterly Action Plan updates

Clarity on these two points helps align the efforts of your marketing, sales, operations, and finance team. Each department has an interest in, and different perspective about this data. This section of your plan provides a place for all groups to contribute their ideas.

The intent here is to keep you focussed on the most important clients, the ones most likely to buy, and the most profitable to your business and to ensure you are offering products and services that are truly needed by your customers. Once you capture this information in your plan in Section III, it is easy to update on your quarterly reviews, so it remains current.

The test of this document is when everyone in the company can recognize a potential new customer and know how to categorize a new lead—and to know who is not a prospect, so you don't waste time there.

Depending on the size and scope of your business, you may have a relatively short criteria list, or it may require a matrix or spread sheet to clearly explain your current situation.

Note: As you get more clarity in this section, it may influence your thinking about other parts of your plan such as your Unique Business Proposition and Purpose. With *Plan Genie* you can quickly move back and forth from one section to another to refine and improve your document.

Customer vs. Partner

In the business to business (B2B) world it is common for companies to sell through agents or distributors as well as directly to the end user. If that is true in your case, we recommend, for this section of your plan, you think of your end user as your customer. The next section on Partners and Alliances is set up to capture information about your relationships with agents, distributors, and suppliers.

OUR CUSTOMERS

What is your target market - people or companies that you have identified as the most likely to have a demand for your products and services. What are the characteristics of your ideal customer?

Some parameters/criteria to consider:

Size of company ~ Industries ~ Strategic influence ~ Ownership/corporate status: public, private, non-profit, government ~ Location of headquarters. decision makers ~ Years in business ~ Geographic territory ~ Age, growth, maturity ~ Credit rating

Also consider categories such as Tier 1, Tier 2, Primary and Secondary

Our primary target market consists of companies/consumers that meet these criteria:

Our secondary market will have these criteria:

Our current best prospects:

Review existing clients for profitability, untapped opportunity, concentration, and risk exposure:



OUR SERVICES

Describe your services, products and what you charge for them.

List or attach an existing document.

What changes to services and fees should we make to meet our customers changing needs?

OUR PRODUCTS

List or attach an existing document.

What changes to products and fees should we make to meet our customers changing needs?

OUR RATES AND FEES

SERVICES - FEES

List or attach an existing document.

PRODUCTS - FEES

List or attach an existing document.

Partners, Alliances, and Influencers

Every business relies on other companies or individuals to help produce the products and services for sale (suppliers) or to help sell your products and services (distributors/agents), or both. These partners and alliances are critically important to your business success.

The distinction between a Partner and Alliance is a matter of degree. **Partners** are typically connected with a formal legal agreement with mutual benefits for each company. An **alliance** is a less formal relationship where you may work together on a less frequent basis.



Influencers are those individuals or companies that can influence market opinion about you and your company, in a positive or negative way. Influencers are typically found in the world of social or traditional media, and in trade or industry associations. In today's world of exploding social media, the affect influencers have on your business will surely grow. Getting clear on who your influencers are will help you formulate strategies and action plans later in this workbook.

Despite its importance to business success, this work of improving partner and alliance relationships and enlisting the support of Influencers often takes a back seat to other priorities in day-to-day operations, more reactionary rather than through an intentional plan. As you document the picture in this section of your plan, you set the stage for continuous improvement, intentional and thoughtful changes over time.

Partners Alliances and Influencers

The intent here is to assess these relationships and build more productive ones in the future. Start by looking at the criteria for a productive partner or business alliance. What do you need from a business partner to ensure successful results?

For example:

- ✓ Are their business interests aligned and complimentary with yours?
- ✓ Are they open to sharing information about clients?
- ✓ Do they have the same or similar corporate values?
- ✓ What other criteria can you use to identify a solid business partnership/alliance ensuring your company's success?

Once you've captured the current picture in this section, you have a starting point for making improvements via the quarterly action plans in **Step IV** of this document.

STRATEGIC PARTNERS

Define criteria for selecting a business partner:

Define criteria for
selecting Business Partners.

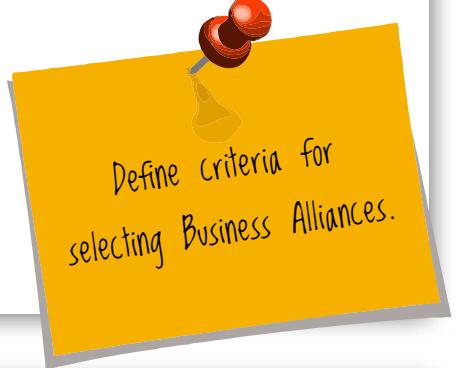
Our current business partner(s):

WHAT CHANGES SHOULD WE MAKE TO STRENGTHEN THESE PARTNERSHIPS?

STRATEGIC ALLIANCES

Define criteria for selecting a business alliance:

Our current business alliance(s):



Define criteria for
selecting Business Alliances.

WHAT CHANGES SHOULD WE MAKE TO STRENGTHEN THESE ALLIANCES?

INFLUENCERS

Define criteria for selecting business influencers:

Our current business influencers:



WHAT CHANGES SHOULD WE MAKE TO STRENGTHEN OUR RELATIONSHIP WITH INFLUENCERS?

Competitors

This part of the workbook is designed to capture information and bring attention to your competitors. Although we don't recommend spending a lot of energy or focus on competitors, it is helpful to keep track of who they are, and, over time, learn as much as possible about them and from them.

Start with a list of who they are, with a subjective "risk rating" and a comment on what they do better than you do. What do they, or their customers, say is their competitive advantage? Check their web site, other social media sources.

If you have the inclination and resources you can dig into more detailed Business Intelligence data on your competitors over time. Keeping this document current on each review period will remind you to pay close attention to your changing customer needs, and help refine your target market for future growth.

Keep in mind, a competitor, depending on your perspective, may be a potential future partner or alliance.

LIST OF COMPETITORS

Company	Risk Rating	Competitive Advantage

CHAPTER 7

Chapter 7: Department Action Plans

90-Day Projects/Action Plans

- ✓ *Outline 8 sections. Tailor to your business.*
- ✓ *Accountability/Delegation*
- ✓ *Costs*

The *Action Plans* section of the workbook is designed to help you target specific departmental goals that are aligned with, and support, the larger corporate goals set out in **Step 1**.

The first three steps of your plan, *The Summary, Values*, and the current picture of *Where You Are Now* (Customers, Products & Services, Partners, Competitors) provide the context for your **90-day Departmental Action Plans**. You are ready to engage your team in the important work of executing your plans.

The key to successful execution is the 90-day cycle of identifying and completing the major priorities/action steps by department. Most companies are organized into 3-4 departments of specialised areas of work:

- ✓ **Business Development/Marketing and Sales** Attracting new customers and closing sales contracts
- ✓ **Operations/Customer Service** Delivering on the promises in the sales contract
- ✓ **Finance and Administration** Tracking and documenting the business activity
- ✓ **People/Talent Management** Attracting, recruiting, and retaining staff

Eight Functional Sections

In *Plan Genie*, we expand the list to eight distinct functional sections, separated out for planning purposes. In practice, all this work is interrelated, so your organization chart might look more like the list above. However, these eight sections are sufficiently important to warrant assigning a team leader to *each* of them. As you work through the sections it will become apparent where they fit in your current organization structure. You can rename or tailor these sections to suit your specific business.

EIGHT IMPORTANT SEGMENTS FOR YOU TO CONSIDER IN YOUR PLAN:

1. **Marketing** Communicating with current and future customers, building your brand awareness
2. **Sales** Moving a qualified prospect to a sales contract
3. **Operations/Service Delivery** Delivering on your promises in the sales contract
4. **People/Talent Management** Attracting, recruiting, and retaining talented people
5. **Partners, Alliances, and Influencers** Building productive relationships with these key resources
6. **Finance and Administration** Tracking and documenting financial activity, key performance indicators and operating systems, and administration support
7. **Technology** Pro-active adoption of technological advancements throughout the company
8. **Community and Environment** Pro-active involvement in your community and responding to climate change

Note: The web version of Plan Genie will consolidate your actions plans into a quarterly prioritized list for each department.

In each 90-day cycle some sections may have a higher priority than others but paying attention to all 8 sections will help you avoid the trap of moving forward in one department, only to discover later that another part of your business is falling behind.

The *Plan Genie* workbook has the same format for all eight areas.



Each Department Action Plan has the following four worksheets for you to complete:

1. List of Critical Impediments
2. One Year Goals
3. Action Plans – Key projects
4. Clarifying notes

1. Critical Impediments

Making a list of critical impediments at the top of your departmental plans is a useful exercise to provide context for the 90-day action lists. This takes only a few minutes and will set the group up for productive thinking and brainstorming on how to get around, over or through these impediments. When shared with other departments, this list may prompt creative solutions or support from other areas of the company.



For example, your sales team may identify excess administration work impeding their ability to make more sales calls. Or the finance and administration team might list as an impediment – incomplete or inaccurate data entered by the sales team in their invoicing. Documenting these impediments not only will generate action plans within a department but could also influence changes in other parts of the company. Each section of your business will better understand how all the departments are interrelated and need to coordinate their efforts to improve overall company results.

Tip: Space station commander, Chris Hadfield (chrishadfield.ca), explained that his team spent 4 years planning their 6-month mission. They were constantly looking at “what can kill us” and planned accordingly.

2. Goal setting

What is the desired outcome/results you need from this area of the business over the next 12 months?

3. Action Steps

What are the most important projects that need to be completed in this quarter to improve your results?

THE PLAN GENIE

Be succinct in completing these sections of your plan. The intention is to make it clear what your department is expecting to deliver by year end, and an outline of the key projects you are currently working on. Keep it high level but with enough detail that others in the company can quickly understand your plan.

Again, there is a blurred line between a goal (*the result*), and strategy (the “how to do it” part). Don’t spend a lot of energy on the semantics. The key is creating a to-do list, select a champion to lead the project, and set a reasonable completion date.

Involve your whole team in creating departmental plans. Collaboration will improve both the quality of the work and engagement in execution.

Person Responsible: The project leader responsible for executing the action steps and reporting back to the team in the 90-day review meeting.

Completion Date: In most cases this will be the 90-day review date, but it may be shorter or longer as required.

Cost: Enter an estimate of any costs associated with the action item. The intention here is to introduce a discipline of cost control and efficiency when contemplating the best option for each action item.


Note: Plan Genie is not designed as a project management tool. It is designed to help you create a short list (1-3 mini projects) for each department, for the next 90 days—just the “headlines,” not the full story. This will keep your plan neat and tidy and easy to review. More detailed department project plans are best done using other formats.

4. Clarfying Notes/ Tracking your progress

What gets measured, gets done

Once you have your plan ready to go, it is helpful to investigate how you are tracking your progress. In this section of your workbook, we invite you to review your key performance indicators (KPI's): What are you measuring and what, if any, changes do you need to make to get better feedback for your team?

Once you compete this section of your workbook, you will have a complete set of action plans that address all aspects of your business. You also have the documents you need to help everyone understand their contribution to the larger picture, and how their fellow employees are involved in moving the company towards its goals. The stage is also set for more effective collaboration between departments, as everyone has a broader picture of what needs to be achieved.



DEPARTMENT PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Department: _____

Issue, problem, challenge	Priority



DEPARTMENT ONE-YEAR GOALS

Owner: _____

Date: _____

Department: _____

Goal #1: _____



Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

DEPARTMENT ACTION PLAN

(90-Day Projects)

Department: _____

Date: _____

Project #1	Owner	Completion Date	Cost
------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
------------	-------	-----------------	------

Title: _____

Description:

DEPARTMENT PLANNING NOTES

Owner: _____

Date: _____

Department: _____

What resources are required to complete these goals?

How will we measure our progress?

✓ How will activities be tracked and documented?

✓ What are we currently measuring and how?

✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 8

Chapter 8: Marketing Plan



Marketing Vs. Sales

Marketing and sales are related, but different activities. For documenting your plan, we separate them into two sections. The **sales plan** addresses all activities, processes, and tools to facilitate the close of a contract, a sale, and beyond. In practice there is often overlap, or blending, of these two distinct types of activities. The **marketing plan** includes any activity that involves communication with new prospects, your existing clients and builds brand awareness for the ultimate goal of generating new business opportunities. Complete the following four worksheets to document your marketing plan.

Marketing Critical Impediments (optional) Brainstorm a list of issues, problems, challenges that could impede your progress to attaining your goals for this department. Use this list as a reference point as you work through the next three worksheets.

Marketing Goals Describe a successful marketing program in terms of a future result. (Describe the situation that exists at a future date 12 months out.) *Visualize the future and write it down on the worksheet.*

Marketing Goals

THOUGHT STARTERS

- 💡 The number of new leads (prospective customers) per month has increased from x/mo. to y/mo.
- 💡 Your brand is more widely recognized in your market sectors. (Can you measure this? Use quantifiable language if available.)
- 💡 Access to information about your products and services is demonstrably easier and simpler for clients and prospects
- 💡 Activity levels on relevant social media platforms has measurably increased

Marketing Action Plan

THOUGHT STARTERS

(Your list may include action items such as:)

- 💡 Revise our web site: select a web design firm to consult with on an ongoing basis
- 💡 Improve our search engine optimization to place higher on major search engines
- 💡 Launch E-commerce platform, increase on-line sales
- 💡 Prepare for fall trade show

Marketing Action Plan *What are the most important marketing projects for the next quarter? Consider both traditional and digital "routes to market."*

WEBSITE **social media** blogs **corporate brochures** NEWSLETTERS white papers
testimonials advertising **trade shows** CONFERENCES **promotional materials** events
gifts LUNCH AND LEARN EVENTS/WEBINARS **phone campaign** client appreciation events.

Planning notes: Add clarifying notes to your plan. (Examples: Tracking activity, Key Performance Indicators)

MARKETING PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Department: _____

Issue, problem, challenge	Priority



MARKETING ONE-YEAR GOALS

Owner: _____

Date: _____

Department: _____



Goal #1: _____

Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

MARKETING ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

MARKETING PLANNING NOTES

Owner: _____

Date: _____

Department: _____

What resources are required to complete these goals?

How will we measure our progress?

✓ How will activities be tracked and documented?

✓ What are we currently measuring and how?

✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 9

Chapter 9: Sales Plan

Your sales plan is connected at the hip with your marketing plan—two distinctly different sets of activities, with the common goal of business growth. Your sales plan will help you improve the buying experience of your customers and close more sales. This work includes all activity related to:

Your sales plan picks up the qualified lead from your marketing efforts and moves it through the buying process.



- ✓ Increase conversion rates of new leads to contracts
- ✓ Increase repeat sales from existing customers
- ✓ Change customer mix by adding more high margin customers, fewer low margin customers

On the following worksheets:

- ✓ List the **Critical Impediments** facing your sales team
- ✓ Set **1-Year Goals**; Describe the future situation that captures the ideal outcome of your sales program. What does a successful sales program look like 12 months from now?

Here are a handful of metrics to consider:

- 💡 The number of days you shorten your average sales cycle
- 💡 The close rate on new customers
- 💡 The average revenue per new customer
- 💡 The percentage of marketing-qualified leads (MQLs) that turn into sales opportunities
- 💡 The percentage of sales opportunities that turn into new customers
- ✓ **Action Plan:** Outline 1-3 key projects for the next quarter. (see *Thought Starters*.)
- ✓ Add **Clarifying Notes** to your plan.



Sales Action Plan

THOUGHT STARTERS

Consider the following...

- 💡 Create a sales map (the buyer's journey)
- 💡 What selling tools are needed? Examples: Letters, proposals, contracts, testimonials, references
- 💡 Training/coaching
- 💡 Reward system
- 💡 People
- 💡 Technology/CRM
- 💡 Documenting your sales process
- 💡 Tracking activity and Key Performance Indicators

SALES PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge	Priority



SALES ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____



Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

SALES ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

SALES PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

- ✓ How will activities be tracked and documented?

- ✓ What are we currently measuring and how?

- ✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 10

Chapter 10: Operations, Service Delivery Plan



Your Operations Plan deals with all matters related to serving your customer – All activity, systems, processes, tools required to meet your commitments in the sales contract – and deliver more than your promise. What can you do better, differently, to improve the customer experience? The operations and service section of a business is typically where the largest capital and operating costs are incurred such as compensation, rent, machinery or equipment. In addition to improving customer experience, it is important to consider how to improve efficiency in delivering your service and reducing these operating costs.

Your **Operations Plan** includes all activity related to:

- ✓ Improve our customer experience (CE) as measured by Net Promotor Score (NPS)
- ✓ Improving efficiency, reducing fixed overhead
- ✓ Developing new products and services may also fall under this section of your business

On the following worksheets:

- ✓ List the **Critical Impediments** facing your operations/services team
- ✓ Set **One Year Goals**. Describe the future situation that captures the ideal outcome of your operations department. What does improved customer experience look like 12 months from now?
- ✓ **Action Plan**: Outline 1-3 key projects for the next quarter
- ✓ Add **Clarifying Notes** to your plan. (*Tracking activity, Key Performance Indicators*)



Operations Goals

THOUGHT STARTERS

- 💡 Fully engaged and high performing teams
- 💡 Improve our Net Promotor Score from x to y
- 💡 Increase net margin by 5%,
- 💡 Quality standards, accuracy, timeliness goals
- 💡 Productivity & Communication goals



Operations Action Plan

THOUGHT STARTERS

- 💡 Net promoter score (NPS), frictionless service
- 💡 On time delivery, error free
- 💡 Customer communication
- 💡 Training and development
- 💡 Gross margin improvement
- 💡 Performance standards, measurements
- 💡 People
- 💡 Technology, automation, productivity improvement
- 💡 Documenting your systems and processes, tools, templates
- 💡 Continuing innovation
- 💡 Tracking activity, Key Performance Indicators

OPERATIONS PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge	Priority



OPERATIONS ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____



Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

OPERATIONS ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

OPERATIONS PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

✓ How will activities be tracked and documented?

✓ What are we currently measuring and how?

✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 11

Chapter 11: People/Talent Development (Human Resources)



This section of your plan deals with all matters related to growing the **people and talent pool** throughout your company. It is critically important work, whether you are a start-up, adding your first employee, or a mature company dealing with the relentless challenges of recruiting and retaining talented people.

1-Year Goals

Your task here is to set the "HR Department" goals and plot the steps needed to reach them. When setting goals, think in terms of results/outcomes vs action steps.

Action Steps

Christina Stewart, Praxis Performance Group, in her presentation to our CEO peer group, suggested that we break this HR work into three segments, *Attraction*, *Selection*, and *Retention*.

Attraction View this as the "marketing" arm of your HR department. *What action can you take to increase the number and quality of job applicants you receive, before and during a recruitment project?*

Selection View this as the "sales" arm of your HR department. *What action steps can you take to improve the selection process once the qualified candidates are identified? The best candidate is selected and agrees to terms that are comfortable to both parties.*

Retention View this as the "operations" arm of your HR department. *What action steps can you take to develop the talent you have in your company and retain the best?*

Inside each of these sub-categories of HR is a myriad of options and opportunities to improve your hiring practices, your training and development programs, and your compensation and reward systems. Continuous improvement achieved through your 90-day planning cycle will help you build an extraordinary talent pool, all focused on your company goals.

On the following worksheets:

- ✓ List the **Critical Impediments** facing your HR team.
- ✓ Set **1-Year Goals**. Describe the future situation that captures the ideal outcome of your HR department. What do improved HR programs deliver to the company 12 months from now?
- ✓ **Action Plan:** Outline 1-3 key projects for the next quarter.
- ✓ Add **Clarifying Notes**. Tracking activity, Key Performance Indicators

Some quantifiable goals for an HR plan may include measurable results such as:

- ✓ Employee turnover/retention, average length of service
- ✓ Number of unsolicited job applications
- ✓ Employee Net Promotor Scores
- ✓ Average recruiting time
- ✓ Number of grievances/ outcomes in a union contract situation
- ✓ Time lost due to accidents/ illness
- ✓ Internal promotions

PEOPLE, TALENT DEVELOPMENT PLAN - CRITICAL IMPEDIMENTS

Owner: _____ Date: _____

Issue, problem, challenge	Priority



PEOPLE, TALENT DEVELOPMENT ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____



Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

PEOPLE, TALENT DEVELOPMENT ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
------------	-------	-----------------	------

Title: _____

Description:

PEOPLE, TALENT DEVELOPMENT NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

✓ How will activities be tracked and documented?

✓ What are we currently measuring and how?

✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 12

Chapter 12: Partners/ Alliances/ Influencers Plan



This section of your plan deals with an important and often overlooked section of your business: Partners-Alliances-Influencers

All companies rely on their business partners, either on the supply side or distribution side, or both, to help provide products and services to their customers. The distinction between a Partner and Alliance is a matter of degree. Partners are typically connected with a formal legal agreement with mutual benefits for each company. An alliance is a less formal relationship where you may work

together on a less frequent basis. Influencers are those individuals or companies that can influence market opinion about you and your company, in a positive or negative way. Influencers are typically found in the world of social or traditional media, and in trade or industry associations.

In Chapter 6, you summarized the current situation with your partners, alliances, and influencers. The next step is to determine what you want these relationships to look like 12 months from now and decide what steps to take in the next 90 days to move toward those goals. There are two sets or worksheets here, one each for your Partner, Alliances Plan, and for your Influencers Plan. Most SME's will not have devoted resources to handle this work. If you are dealing with the supply side issues, you may assign someone from the operations area of your business to champion this section. If you partner with distributors, these action items might be best handled by a marketing or salesperson.

Partner and Alliances Action Plan

On the following worksheets:

- ✓ List the **Critical Impediments** to improved performance from your Partners and Alliances
- ✓ Set **1-Year Goals**. Describe the future situation that captures the ideal outcome with your Partners and Alliances. What does improved performance from your Partners and Alliances look like 12 months from now? What different results are being delivered to your company?
- ✓ **Action Plan:** Outline 1-3 key projects for the next quarter
- ✓ Add **Clarifying Notes**, Tracking activity, Key Performance Indicators

Partner and Alliances Goals THOUGHT STARTERS

- 💡 Consider productivity, quality improvement, reliability
- 💡 Revised pricing/fee schedules
- 💡 Improved communication/trust
- 💡 Joint marketing, sales campaigns
- 💡 Number of partners. Alliances, e.g., more, or fewer

Partner and Alliances Action Plan THOUGHT STARTERS

- 💡 Redefine, clarify criteria for ideal partner
- 💡 Collect better, more current data
- 💡 Assess and improve communication channels
- 💡 Review, negotiate new fee agreements
- 💡 Plan joint marketing campaign

PARTNERS/ALLIANCES PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge		Priority

PARTNERS/ALLIANCES ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____

Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:



PARTNERS/ALLIANCES ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

PARTNERS/ALLIANCES PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

- ✓ How will activities be tracked and documented?

- ✓ What are we currently measuring and how?

- ✓ What should we start tracking in the future?

Other Considerations:

Influencers Action Plan

This section of your plan deals with all matters related to improving the impact of Influencers on your business. Influencers are those individuals or companies that can influence market opinion about you and your company, in a positive or negative way. Influencers are typically found in the world of social or traditional media, and in trade or industry associations.

Note: the **most important influencers** for any company are your current customers. Your plans to improve customer experience and drive more active referrals from your existing customers is found in Chapter 11.

On the following worksheets:

- ✓ List the **Critical Impediments** to improved results from your Influencers.
- ✓ Set **1-Year Goals** Describe the future situation that captures the ideal outcome with your Influencers. What does improved performance from your Influencers look like 12 months from now? What different results are being delivered to your company?
- ✓ **Action Plan** Outline 1-3 key projects for the next quarter.
- ✓ Add **Clarifying Notes:** Tracking activity, Key Performance Indicators

Influencers Goals

THOUGHT STARTERS

- 💡 Track data – eg. number of positive/negative articles in traditional/social media
- 💡 Identify key influencers, build relationships



Influencers Action Plan

THOUGHT STARTERS

- 💡 Identify high profile Influencers in your industry
- 💡 Participate in trade/industry associations

INFLUENCERS PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge	Priority



INFLUENCERS ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____

Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:



INFLUENCERS ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

INFLUENCERS PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

✓ How will activities be tracked and documented?

✓ What are we currently measuring and how?

✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 13



Chapter 13: Finance and Administration Plan

The Finance and Administration Department serves and supports internal clients (other departments) and can contribute to customer and partner experiences and overall company success. This section of your plan deals with improvements to tracking and documenting your business activity, specifically financial data, and other key performance indicators (KPI's). In most companies, this area will also manage internal administration support including your compensation and benefit program.

On the following worksheets:

- ✓ List the **Critical Impediments** to improved performance from your Finance and Administration team.
- ✓ Set **1-Year Goals**. Describe the future situation that captures the ideal outcome with your Finance and Administration department. What does improved performance from your Finance team look like 12 months from now? What different results are being delivered to your company?
- ✓ **Action Plan:** Outline 1-3 key projects for the next quarter.
- ✓ Add **Clarifying Notes**. Tracking activity, Key Performance Indicators

Finance and Administration Goals

THOUGHT STARTERS

Month end financial reports – timeliness and accuracy. Eg “3 day close”, financial reports prepared and distributed within 3 days of month end cut-off

- 💡 Financial forecasting
- 💡 Revised and relevant Key Performance Indicators by department
- 💡 Improved Bank, lender relationships
- 💡 Partner contracts revised, renegotiated
- 💡 Compensation system updated, simplified, easy to administer
- 💡 Internal administration system updated, simplified, documented
- 💡 Improved customer, partner experience on all matters financial



Finance and Administration Action Plan

THOUGHT STARTERS

- 💡 Identify “upstream” bottlenecks in processing financial transactions
- 💡 Prepare an invoicing map, clarify procedure, simplify
- 💡 Review current KPI's with each department head, identify changes
- 💡 Research compensations systems, make recommendations for changes
- 💡 Meet with bank representative, share updated plan
- 💡 Contact key customers, discuss opportunities to streamline invoicing and payment systems

FINANCE AND ADMINISTRATION PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge	Priority



FINANCE AND ADMINISTRATION ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____



Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

FINANCE AND ADMINISTRATION ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

FINANCE AND ADMINISTRATION PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

- ✓ How will activities be tracked and documented?

- ✓ What are we currently measuring and how?

- ✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 14

Chapter 14: Technology—The Great Enabler



Technological advancements are moving at an exponential pace. How will you leverage new technology in all parts of your business? Marketing, sales, customer service, finance and administration are all impacted by changing technological advancements. *Where to start? How to prioritize? What's the best fit for your business?* Your Technology Plan will help you lay out a corporate list of priorities and coordinate them across all departments.

Technology

THOUGHT STARTERS

- 💡 What steps do you need to take to get more utilization from existing software? E.g. continuous improvement, training, efficient data entry, improve accuracy, etc
- 💡 What new technologies are available for your industry? E.g. Software, hardware, automation equipment
- 💡 How do you stay informed on new technologies in your industry, or in other applications that can be tailored to your business?

On the following worksheets:

- ✓ List the **Critical Impediments** to improved performance from your use of technology: hardware, software, automation equipment.
- ✓ Set **1-Year Goals** Describe the future situation that captures the ideal outcome with your technology applications. What does improved technology look like 12 months from now? What different results are being delivered to your company?
- ✓ **Action Plan** Outline 1-3 key projects for the next quarter.
- ✓ Add **Clarifying Notes**: Tracking activity, Key Performance Indicators

Technology Goals

THOUGHT STARTERS

- 💡 System in place to identify current and future technology requirements for each section of your business.
- 💡 Transition to "paperless" processes complete.
- 💡 98% data accuracy ERP, CRM, other software programs.



Technology Action Plan

THOUGHT STARTERS

- 💡 Technology capital plan – complete inventory of tools and equipment and forecast 3-year requirements
- 💡 Document training manual for current software programs for new employee orientation
- 💡 Appoint "Technology Committee" to research opportunities and report quarterly

TECHNOLOGY PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge	Priority



TECHNOLOGY ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____

Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:



TECHNOLOGY ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

TECHNOLOGY PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

✓ How will activities be tracked and documented?

✓ What are we currently measuring and how?

✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 15

Chapter 15: Community and Environment Plan

This section of your plan has two parts:

1. **Environment and Climate Change** Examine how your business can affect climate change and how climate change can affect your business.
2. **Community** Your business, a legal entity, operates within a community and has social responsibilities. What steps can you take to be a pro-active contributor to your community?

Part 1: Environment/Climate Change Plan

On the following worksheets:

- ✓ List the **Critical Impediments** to *improve the impact of your business on the environment and reduce the impact of climate change on your business.*
- ✓ Set **1-Year Goals**. Environment/Climate Change Goals: What does a successful climate change program produce one year from now?
- ✓ **Action Plan:** Outline 1-3 key projects for the next quarter.
- ✓ Add **Clarifying Notes**. (*Tracking activity, Key Performance Indicators*)



Environment/Climate Change THOUGHT STARTERS

What are the risks and opportunities of *climate change* on your business?

- 💡 Physical risks? Legal risks?
Regulatory risks?
- 💡 Appeal to climate conscious customers, employees, business partners?
 - ◆ Customers: A transparent environment policy can have an impact on the your customer's buying decision
 - ◆ Employees: Talent attraction and retention advantages for a climate ready employer
 - ◆ Business Partners: What are the environmental, climate change risks of your partners, suppliers and/or distributors?



Environment/Climate Change Action Plan

THOUGHT STARTERS

- 💡 Collaborate with your business partners, lenders, on climate change strategies
- 💡 Add an environment/ climate change statement to your Values section
- 💡 Review and document the climate risk for your company – physical, legal, regulatory
- 💡 Review disaster risk with your insurer, potential premium adjustments, reduction in insurability
- 💡 Assign a project lead for this section

- 💡 How do you align with climate conscious investors, lenders, insurers?

What can you do to *reduce your impact on the environment* and reduce your climate footprint?

ENVIRONMENT/CLIMATE CHANGE PLAN - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge	Priority



ENVIRONMENT/CLIMATE CHANGE ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____



Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:

ENVIRONMENT/CLIMATE CHANGE ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

ENVIRONMENT/CLIMATE CHANGE PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

- ✓ How will activities be tracked and documented?

- ✓ What are we currently measuring and how?

- ✓ What should we start tracking in the future?

Other Considerations:

Part 2: Community Plan



This section deals with all activities, processes and tools related to being a responsible member of your community.

Your company exists within the communities where you transact business. As citizens, businesses have responsibilities to their communities just like every other citizen. You meet these responsibilities by contributing support beyond complying with all laws and paying taxes. This falls within the general heading of "giving back."

WE DEFINE OUR COMMUNITY AS:

OUR COMMUNITY SUPPORT INCLUDES:

THE PLAN GENIE

On the following worksheets:

- ✓ List the **Critical Impediments** to improved performance from your community contribution and participation
- ✓ Set **1-Year Goals** - Describe the future situation that captures the ideal outcome with your community? What does improve community contribution look like 12 months from now? What different results are being delivered to your community?
- ✓ **Action Plan:** Outline 1-3 key projects for the next quarter
- ✓ Add **Clarifying Notes.** (*Tracking activity, Key Performance Indicators*)



Community Goals

THOUGHT STARTER

Make a measurable difference in the lives of...

Community Action Plan

THOUGHT STARTERS

- 💡 Choose a specific charity or cause to support that has an affinity for both the company and employees.
- 💡 How can you leverage your resources for maximum impact?

COMMUNITY - CRITICAL IMPEDIMENTS

Owner: _____

Date: _____

Issue, problem, challenge	Priority



COMMUNITY ONE-YEAR GOALS

Owner: _____

Date: _____

Goal #1: _____

Notes:

Goal #2: _____

Notes:

Goal #3: _____

Notes:

Goal #4: _____

Notes:

Goal #5: _____

Notes:



COMMUNITY ACTION PLAN

(90-Day Projects)

Project #1	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #2	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

Project #3	Owner	Completion Date	Cost
-------------------	-------	-----------------	------

Title: _____

Description:

COMMUNITY PLANNING NOTES

Owner: _____

Date: _____

What resources are required to complete these goals?

How will we measure our progress?

✓ How will activities be tracked and documented?

✓ What are we currently measuring and how?

✓ What should we start tracking in the future?

Other Considerations:

CHAPTER 16

Chapter 16: Final Steps

Organization Structure, Key Performance Indicators, 90 Day Review



Final Steps

Although this is the last piece of your business plan, it is one of the most important. Now that you have completed your narrative plan, there are three more things to consider to ensure the plan remains relevant and the planning process gains momentum. Once the action plans are completed, it's important to review:

- ✓ How you track your progress
- ✓ How your company is organized
- ✓ Schedule your next review session.

Key Performance Indicators (KPI's)

"What gets measured, gets done."

We all like to know how we are doing, from the CEO to the sales team, the service reps, or the admin group. Your plan provides the reference point to measure your progress. What are you tracking? Is it relevant and meaningful?

Look for the activities that drive the business, that have the most impact on results. How are you tracking those activities? Make a list of *Key Performance Indicators*, at a corporate and department level. Review the list on a regular basis. You will soon learn what is important to your success and what isn't.

You may find it helpful to transpose some of the key elements of your plan to a one-page **Company Plan Summary** (see page 93). This form captures both the Company Goals and the Department Goals on a single page. Use this form as a reminder of your personal commitments for the quarter and to make notes or ideas for discussion at your next planning meeting.

Organization Structure

The organization structure diagram clarifies areas of accountability, reporting lines, and assist communication throughout the company. It is intended to help all employees understand how they can best contribute to the overall company goals.

As you assign responsibilities for the action plans, questions will arise around how the company is organized and what people or other resources may be needed to get the job done. This is a good time to review your organization chart and make changes that will support the plan. Once you are clear about your goals and the action plans, planning future changes to the organization structure is a straightforward task.



One way of doing this is to draw the current organization chart, and then a second one that reflects changes you may need over the next 1 to 3 years.

Even the smallest companies should have an org chart, although the names in the boxes may be repeated because of shared responsibilities. It will help you visualize the balancing of resources needed to drive new business concurrent with delivering products and services to your existing customers.

THE PLAN GENIE

Most private sector companies are organized around 4-5 business areas: *Marketing, Sales, Operations/Customer Service, Finance and Administration*. Your organization structure may vary depending on the size and type of business. In small companies, individuals may wear several hats, and need to jump from one role to another (*President, to Sales Manager to Parts Delivery*) all in a day.

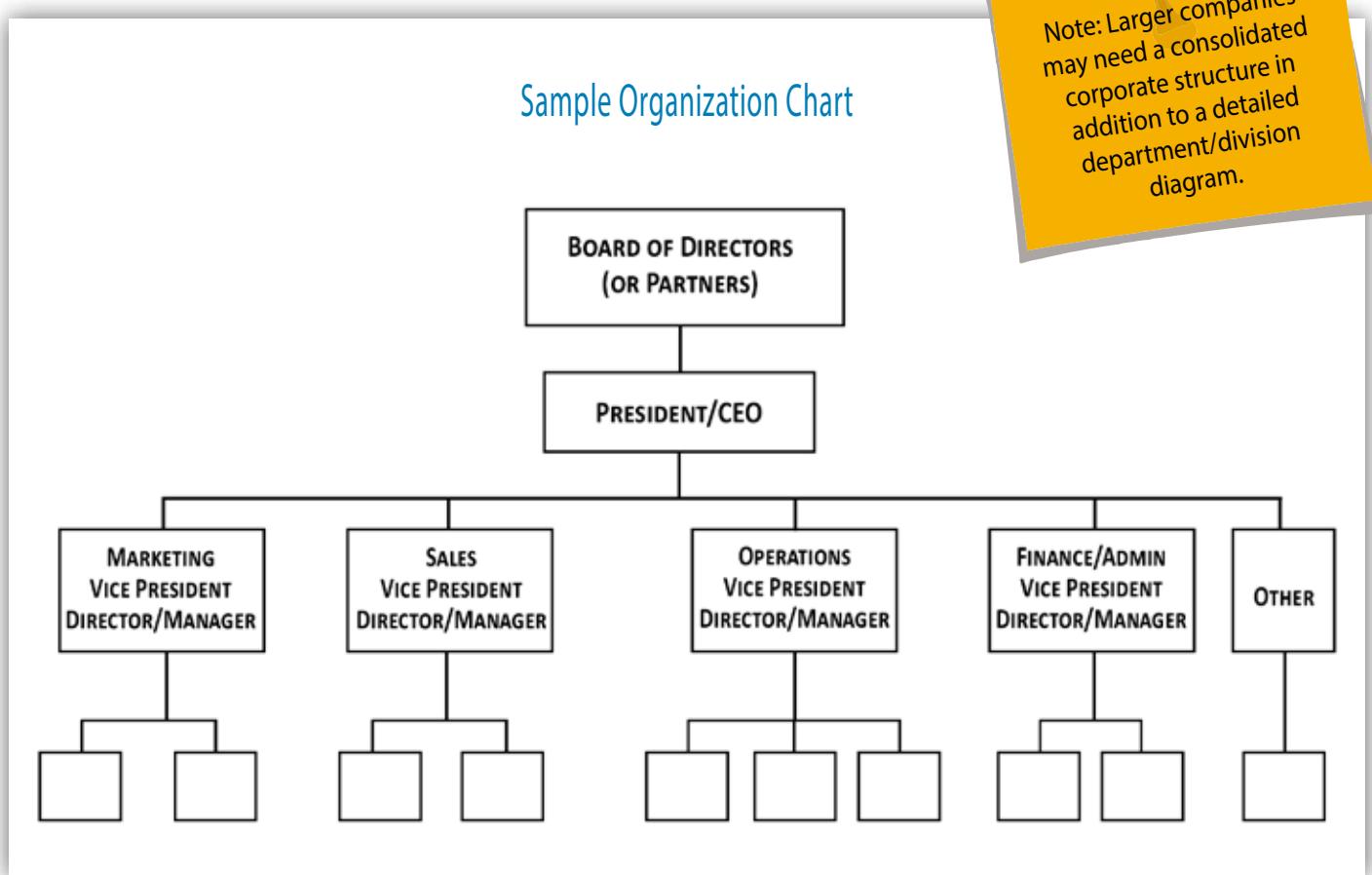
Now that you have a complete picture of the work that needs to be done, it is an excellent time to update your organization chart to ensure you have the resources aligned with your commitments in the plan. We suggest you do this in two steps.

1. Pull up your current chart and review it for accuracy and bring it up to date
2. Next, sketch a future chart that reflects all the resources you need to execute your plan

As you compare your current chart with the future chart you will get a feel for the gaps. This will help you identify training and development needs, revise job descriptions, promotion and transfer opportunities, and prioritize your recruitment needs.

Updating your organization chart is an integral part of your planning success. It provides the context for the execution of your plan. Context determines how people will behave (and perform). If you want to change behavior, change the context, behavior follows.

See the sample organization chart that follows, then create your own!



Business Plan Quarterly Review

Schedule your Business Plan quarterly review sessions and put them in the corporate calendar. Make this information public and stick to the schedule. Ninety days is the natural cycle for refreshing your plans. Our world is constantly changing. If your plans are left beyond 90 days, clarity turns to confusion and energy starts to be wasted. Get into a 90-day habit. Each revisit to your working business plan will add more insights. You will soon get very efficient at this work and begin to look forward to it.

CURRENT ORGANIZATION STRUCTURE

Draw the Current Organization Structure below

FUTURE ORGANIZATION STRUCTURE

Draw the Future Organization Structure below

COMPANY PLAN SUMMARY

Start Date: _____

Next Review Date: _____

PURPOSE

Why do we do this for our customers?

UNIQUE BUSINESS PROPOSITION

What makes us unique/special/different?

VALUES (*Headlines only*)

3 YEAR GOALS (*Outcomes/Results*)

1. _____
2. _____
3. _____
4. _____

1 YEAR GOALS (*Outcomes/Results*)

1. _____
2. _____
3. _____
4. _____

COMPANY STRATEGIES/MAJOR PROJECTS *for this year*

DEPT/GROUP 1 YEAR GOALS (*Outcomes/Results*) Leader/Dept: _____

KEY PROJECTS FOR THIS QUARTER

CHAPTER 17

Chapter 17: Life Plan

"Start with the end in mind."

"How old will you be when you die?" asked our instructor.

"What???" was my reaction.

"How old will you be when you die?"

We were at a workshop with Strategic Coach (strategiccoach.com), a group of entrepreneurs. This was not a question any of us had given much consideration. We spent the next two hours contemplating this topic. It proved to be an enlightening and profound experience for me. When pushed for an answer, most of us considered the average life expectancy for our gender, our parents' health, hedged our bet a little, and settled at a number around 85. (This was 30 years ago)

Then came the interesting part. *How old would you like to be when you die?* As we started to dig into this question, it became apparent that we may have a longer runway out there than we originally perceived. We discussed the changes in medical science, our diet, exercise habits and general lifestyle. Despite our genetic limitations, we felt we could at least improve our odds of a longer healthy outcome if we made some changes.

We were then asked to "paint a picture" of our situation in the last few months and weeks of our life. *Where are we living, with whom, what are we doing, how do we feel, physically and mentally?* I didn't realize it at the time, but this was goal setting on a grand scale. **Start with the end in mind.** I set a new target age of 96 back then. That vision of a healthy and active 96-year-old has affected almost all aspects of my life since then, from simple day- to- day choices to major long-term decisions.

- ✓ "Will that be fries or salad with your lunch?" prompts an easy answer:- "Salad, please."
- ✓ The temptation to "hang up the skates" has been postponed indefinitely.
- ✓ I have enlisted the support of my family doctor to support me in reaching my health and fitness goals. She ensures we regularly monitor my "key performance indicators" in the health and fitness front.
- ✓ Staying engaged and challenged in meaningful work is necessary to a healthy and active mind. Retirement is postponed indefinitely.

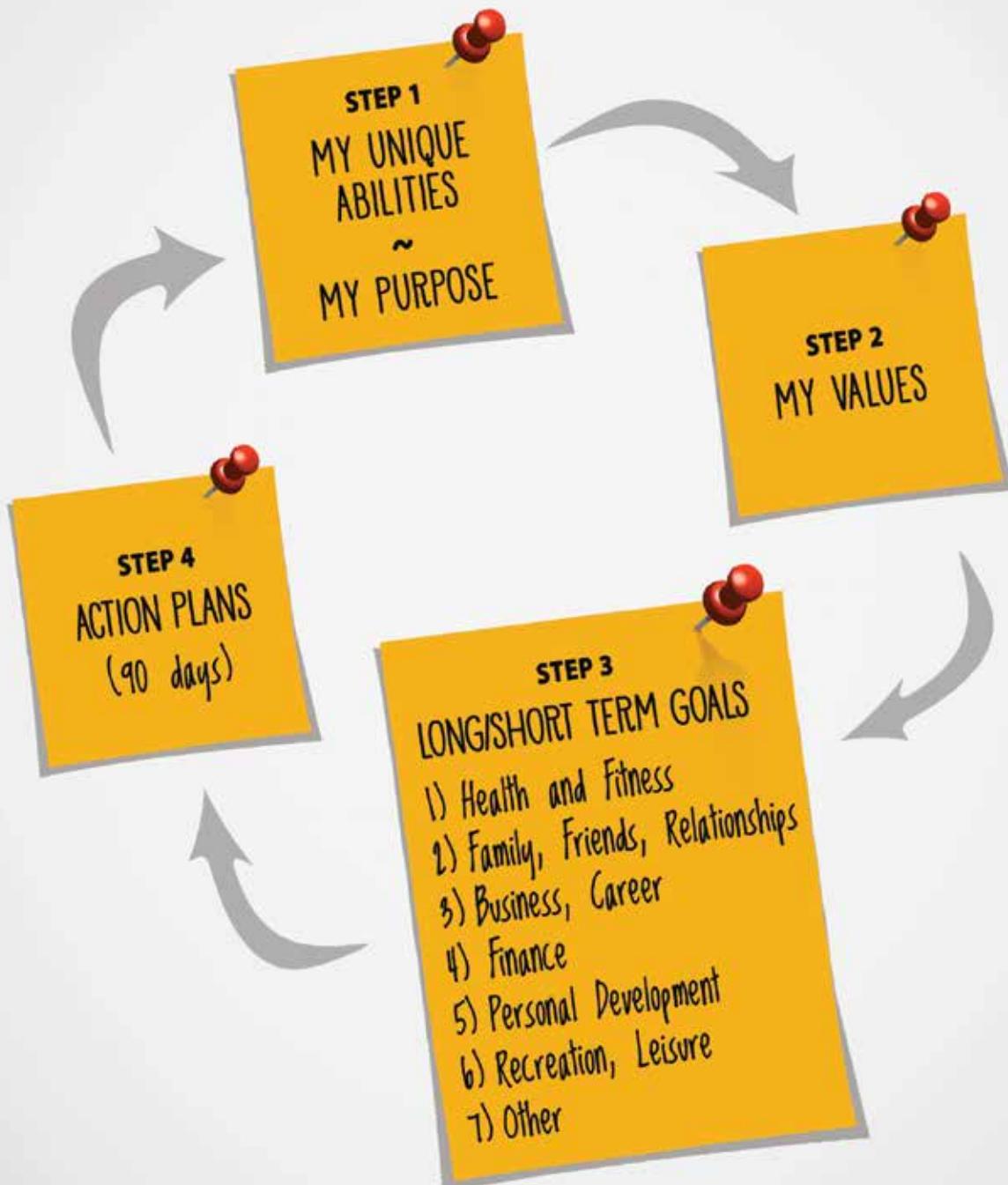
Below is the [*Plan Genie Life Plan Workbook*](#) for you to begin setting future goals in all facets of your life. It is designed in a similar format as the workbook for business. Life planning can be done on you own or with family and close friends and colleagues. Have some fun with this by sharing the exercises with your friends and family. Sharing your ideas with others is a great way keep you on track and stay committed to your plan.



PERSONAL PLAN

Planning is a continuous process.

Review and revise your plan on a scheduled basis (ex: 90 days).



My Personal Plan

Name: _____

Date: _____

Step I: The Foundation

Your Purpose and your Unique Ability—The Foundation and Reference Point for Making Changes in Your Life

For life satisfaction it's important to know "why" you do what you do and what your strengths and weaknesses are. Getting clear about your life's Purpose and understanding your Unique Ability will help you make better personal and career decisions. When you can align your work career with your unique abilities and with your expressed life purpose, great things happen – work becomes energizing and fun, success and enhanced well-being follows.

We live in a society where we often take on too much or feel we aren't doing enough. Unless we identify what areas are working well, and not so well, we may continue along the same monotonous, unsatisfying patterns.

YOUR PURPOSE AND UNIQUE ABILITY

Leverage your strengths to achieve your goals.

Describe your **Life Purpose**. Why are you here? What impact do you want to have on others? Who do you wish to help or influence - individuals, groups, communities?

Describe your **Unique Ability**. What special skill, talent, ability do you possess that is recognizable to you and others?



Step II: Personal Values

From Webster's dictionary:

Value : A strongly held belief about what is valuable, important, or acceptable

Your personal values are the reference point for those challenging moments you encounter in all parts of your life. Being able to define your personal values makes life easier; You know how to respond in tough situations, to make difficult decisions with conviction where many might waiver. We are all thrust into tough situations from time to time—situations where the right thing to do isn't obvious. Knowing which values are most important to you before these situations arise will help you make confident decisions. Without them you are rudderless and reactive to the challenges and choices life presents to you.

When it's difficult to build or sustain a relationship with another, it's often a case of values not aligning. Values are powerful. Religions around the world look to instill common values for how to "be" in the world. Make a short list of the values that are most important to you today. Then define these values by describing 2-3 behaviors that illustrate each value.

My Value	Which Means That...
Reliability	<ul style="list-style-type: none"> ✓ I do what I say I will do ✓ I finish what I start ✓ I show up on time ✓ I say please and thank you
Simplicity	Complexity is my enemy. Any fool can make something complicated. It's hard to make something simple
Listening and communication	Seek first to understand, then be understood
Happiness	Everything that happens to me is the BEST thing that can happen to me. Life is a series of events. Embrace them and move on.



THOUGHT STARTERS

Authenticity, Trust, Teamwork, Creativity, Humor, Generosity, Learning, Loyalty, Openness, Spirituality—Do any of these words resonate with you? You may be able to draft a value statement by describing the behaviors that illustrate the value.

My Value	Which Means That... (Describe behaviors you want to model to influence others.)

Step III: Goal setting—Start with the end in mind.

First, a quick review:

Your Significant Accomplishments of 20_____:

Being clear about what you want to achieve in all aspects of your life improves your odds of success by 30%-50%

Personal Goals / Targets you Did Not Achieve In 20_____ and WHY?



Long term goals

What are your long-term goals? (3 years). Describe your picture of success at a finite point in the future, considering these seven segments of your life. Your goals can be quantitative or qualitative.

Note: we suggest you look 3 years out in the future – this provides enough time and space to make significant changes in your life, yet still near enough to keep you focused and pragmatic. Your one-year goals are the milestones along the path to your longer-term goals. You may choose different time frames to suit your situation.

1. Health and fitness

Last Medical Physical:

Results / Concerns:

Next Medical Physical:

Current Weight:

Long term (3-year) goals:

Short term (1-year) goals:

2. Family, Friends, Relationships Goals

What changes would you like to see in your relationships with the most important people in your life?

Long term (3-year) goals:

Short term (1-year) goals:

3. Business/Career Goals

Long term (3-year) goals: What is your work/career situation 3 years from now?

Short term (1-year) goals: What milestones would you like to reach in the next year?

4. Financial Goals

Long term (3-year) goals: What are your personal/family financial goals 3 years from now?

Thought starters: Your personal/family income, personal net worth, assets you want to acquire, and/or debt reduced

Short term (1-year) goals: Milestones for the next year, income, and net worth:

5. Personal Growth and Development Goals

These can be work-related or personal hobbies, recreation, or enlightenment.

Thought starters: Education, New Skills, New Experiences

Long term (3-year) goals:

Short term (1-year) goals:



6. Recreation and Leisure Goals

Success in your life requires adequate rest and rejuvenation. Put these dates in your calendar.

Last Vacation

Date: Length: Where: With:

Next Vacation

Date: Length: Where: With:

Bucket list items for the next 1 - 3 years:

7. Other Long-Term Goals

Use this space to record other goals not captured in the previous 6 sections.

Step IV: Action Steps

Now that you have a list of your goals, what action steps will you take to reach your goals in the next 12 months. One or two mini projects for each goal is enough to get started.

Tip: Before you work on the action steps, you may find it helpful make a quick list of Critical Impediments. Brainstorm a list of obstacles/blockers to reaching your goals. use 3–4-word bullet points. This will help you think more freely about the action steps you want to take.

Critical Impediments



Focus on the next year. List the action steps you will take to reach your goals.

Review all your goals and make a priority list of the life work you want to get done in the next year. Keep the Action Steps at a high level, headlines only, in a short description of one or two projects for each goal. Making a few changes every quarter or season, will soon build momentum and move you towards the longer-term changes you noted earlier.

Action Steps – Focus on the next 90 days

Goal	Action Steps	By When?

How I Manage My Most Precious Commodity: My Time

Use this chart to help you assess how you are balancing your time in the various aspects of your life, and any adjustments you want to make. The column on the left can be tailored to your situation. This activity should help you see your current situation and help you identify changes you need to make.

	20_____ Actual (%)	20_____ Goal (%)	Dream Goal (%)
Health/Fitness ~ Exercise			
Family			
Social			
Work/Business			
Spiritual			
Self-time			
Pers. Develop.			
Community			
Play			
Sleep			
Total	100%	100%	100%

Changes I Need to Make

What is one way you could behave differently that would improve your life and your family culture? Focus on one, small change, and try it out!

And now How old would you like to be when you die?

My ultimate goal: To live a healthy, active, and happy life to age _____.





THE BUSINESS MENTOR YOU NEVER KNEW YOU NEEDED.

Do you have some worrying (scary) business questions, (*nail biting*) going on?

We've been helping individuals take control of their business and personal lives for decades.

We've packaged "business education through the act of planning" into a bottle, so to speak, and released Plan Genie products to **EMPOWER YOU** in business.

All we do and teach is based around the belief that all businesses can be better through the act of documented planning.

Yes, financials and forecasts are important, but what about the body of your business?

Are you feeding it properly? Is it strong? Most business issues are universal, there's a cause and a remedy.

Plan Genie helps you "open the hood" of your business, see what the current situation is, and offers practical, hands-on education and tools to make changes for your own happiness and business health.

WHAT DO PLAN GENIE USERS HAVE TO SAY?

"Servicemaster has used Plan Genie for three years to help develop our business and our strategic plan. We have grown 3 years in a row and the action plans that are established using Plan Genie are integral in holding all our people in our business accountable as we work towards our goal. Plan Genie is easy to use and easy to adjust when the economy or business factors change. I would encourage all businesses to use Plan Genie."

- Warren Groom, Servicemaster

"Plan Genie makes business planning so much easier! We've found that it's gone from being a real chore to a fun exercise."

- Krysta Francoeur, Studio9

"Clarity,
focus,
purpose
and
direction."
- John Clerides
Marquis Wines

"A MUST HAVE for any business owner who isn't exactly sure where they're going or how to get there (that would be most of us). And a must have for any business owner who IS sure where they're going! The destination is one thing to figure out, the journey is a different exercise and a wee bit more complicated. Just like your GPS, Plan Genie will help you get there safe and sound. I'm a Plan Genie disciple and I approve of this review!"

- David Wilmot, Chair, TEC Canada

"Would recommend to business owners-especially those facing significant organizational challenges."

- Mel Beaton, Commercial Law



You can reach us by email at any time: info@plangenie.com