

Action Planning Intensive  
Contents of 2 day Process

- Action Planning Intensive of 1 & 1/2 to 2 days which includes:
  - Defining The Dream
  - Current Position Analysis
  - Goal Setting
  - Defining the Gaps between the Goals and the Dream
  - Research where necessary to come to tactical plan
  - Setting gate keepers that will guide the tactical process
  - Tactical plan to achieve the goals with time line
  - Tracking time line and tracking tools to
  
- Define the dream, develop an action plan.

The dream business minus the current position analysis equals the goals to close the distance. Any gaps in knowledge to identify and achieve the goals are detailed. Informed goals are organized into a set of tactics to be implemented throughout the year. Monthly tracking processes in key areas assure the achievement of the plan that advances the organization's fitness for enduring success.

•Financial

-Trends For:

- Revenue
- Profit
- Cash
- Debt
- Wages
- Benefits
- Records
- Taxes
- Resources/Capabilities (internal/external)

•Marketing

-Differentiation Statement

-Innovations

- Recent
- Planned

-Improvements

- Completed
- Needed

-Communications

- Audit
- Budget
- Marketing Mix

- Personal Selling
- Advertising
- Promotion
- Publicity
- Public Relations
- Marketplace
  - Customers
  - Position
  - Competition
- Leadership
  - Relationships (passion/engagement/synergy/energy level)
    - Owners/Key Leaders
    - Key Staff
    - Staff
    - Networks/Alliances/Partnerships
- Culture
  - Key Value
  - Values
  - The dream business statement
  - Exit strategy
  -
- Technology
  - Skills/Knowledge
  - Continuing Education
  - Virtual Business Strategy
  - Infrastructure Tools
  - Resources (Internal/External)
- Technical
  - Skills/Knowledge Assessment
  - Continuing Education
  - Credentials
  - Engagement/Importance
  - Action Planning
- Goals
  - Goal statements are to be specific, measurable, and achievable.
  - Goals are to be developed in all five categories:
    - ✓ Finance
    - ✓ Marketing
    - ✓ Leadership
    - ✓ Technology
    - ✓ Technical Skill
- Gaps

-Systematic learning processes centered around the five key categories. Anytime the current position analysis results in “don’t know”, “not sure”, “we think”, “we wonder”, etc. triggers a research effort.

•Tactics

-The names of internal/external staff/resources.

-Timing:

•1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> quarter

-Outlined processes

-Expected outcomes

□Gatekeepers:

•Always linked to Goals and framed by the DREAM.

•Focus:

-Follow One Course Until Successful

•Tracking

-Monthly progress checks

-What new information has become available during the course of the plan

-Course adjustments/leverage points

□Gatekeepers:

•Be disciplined

•Pay attention

•Use the language of the plan