**Strategic Planning Example** – Page 1: “The Context”

***Company Target Market****:* Visionaries and Social Change Makers

***Company Transformation Provided****:* Create a Real and Profitable Business While Creating Social Change

***Relevant External Drivers***:

* Customer expectations have increased (for quality programs, easy to use materials, visually pleasing videos and handouts, etc)
* Customers expect and want advanced programs to take them further
* Competition is increasing and differentiation between different information products in this space is decreasing
* Cultivating partners and motivating them during launches to engage and perform well is more challenging
* FB Advertising costs are predicted to increase significantly

***Big Outcomes / Company Goals (making sure these take into account the elements above first, and then below)***

* CEO working less hours and while also enjoying his role (doing the things he wants to do in his role)
* New Live Event
* New High End Coaching Program
* Implement Evergreen
* Improved Performing Internal Launch (especially partner performance)

***Internal Constraints (re-examine Goals, making sure these constraints can be addressed)***

* Limited resources to invest in new roles or more manpower
* Delivering more coaching services when the revenue increases – would need coaches
* Difficult to expand the internal infrastructure quickly if the revenue rises significantly, especially when the new programs go live
* Doing new programs AND more revenue in the current programs while utilizing LESS of CEO’s efforts
* Company hasn’t done live enrollment events before, missing this expertise
* Lack of high level expertise outside of CEO (especially creating content)

Strategic Planning Example – Page 2 “The Plan”

***Company Goals +Priority Projects and Organizational Improvements Needed to Achieve the Goals + Project/Initiative Leaders***

* **Revenue: Overall** $3MM
	+ Launch $1.5MM
	+ Coaching $750K
	+ Evergreen $150K
	+ New Live Event $100K
	+ New High End Program $500K
* **Profit: Net Profit Margin** 15% (note: this is an investment year, not typical)
* **CEO working less hours and while also enjoying his role (doing the things he wants to do in his role)**
	+ CEO working less project, including clarifying his role and achieving behavior change plus recovery plans (Lead: Mary + CEO)
	+ Team Upgrade / Team Development to fill the gaps and take on more responsibility and support the CEO (Lead: Mary)
* **New Live Event**
	+ Create the Content (without over-working the CEO) (L: John + CEO)
	+ Define desired outcomes, plan, resource and execute on the plan (Lead: John)
	+ Gain new expertise, especially selling / closing (Lead: John)
* **New High End Coaching Program** (Lead: Mary)
	+ Define desired outcomes, plan, resource and execute on the plan
* **Implement Evergreen** (Lead: Joe)
	+ Research / Gain competency in evergreen launches (what’s working) and form plan
	+ Define roles, including team taking more responsibility for this and CEO taking less
* **Improved Performance of the Main Launch** (Lead: Joe)
	+ Project execution with meeting timelines, including recovery plans
	+ Improve and Transform Partner Outreach and Support (L: Joe & Jane)
* **Organizational Improvements** (Lead: Mary)
	+ Org Structure, Functions and Roles: Assess the org structure and functions, identifying gaps and new roles needed, and clarifying all roles
	+ Systems and Process Documentation (Standard Operating Procedures) for Critical Roles and Functions
	+ Reporting and Measurement: Especially for driving better performance from the launch, and making sure new programs are on track
	+ Effective Teamwork during change including utilizing Recovery Plans
	+ Increasing Personal Accountability, and resilience during change (especially with CEO shifting role)

Strategic Planning Worksheet

***Company Mission / Vision:***

***Company Target Market****:*

***Company Transformation Provided****:*

***Relevant External Drivers***:

***Big Outcomes / Company Strategic Goals for the year (making sure these take into account the elements above first, and then below)***

***Internal Constraints (re-examine Goals, making sure these constraints can be addressed)***

Strategic Planning Worksheet

***Company Goals +Priority Projects and Organizational Improvements Needed to Achieve the Goals + Project/Initiative Leaders***

* **Revenue: Overall** $
	+ Biz line or project $
	+ Biz line or product $
	+ Other $
* **Profit: Net Profit Margin**
* **Strategic Goal #1**
	+ Projects to reach goal #1+ Leads:

* **Strategic Goal #2**
	+ Projects to reach goal #2 + Leads:

* **Strategic Goal #3**
	+ Projects to reach goal #3 + Leads:

* **Organizational Improvements** (look at the RBG Framework to help assess which improvements will be most needed to enable and empower achieving the goals above)
	+ Org Improvement Projects + Leads:

# Rapid Business Growth and High Performance Team Framework

## Defined & Aligned Outcomes and Expectations

* 1. Strategic Planning and Advance Planning
	2. 12 Month Priority Business Goals + Projects, Deliverables and Internal Improvements needed to achieve them
	3. Goal clarity and articulating concrete outcomes

## Psychological Safety & Accountability

* 1. Personal Accountability Model – Accountability and Victim Loops
	2. Generating Safety to Achieve Accountability
	3. Moving from Victimization to Accountability
	4. Applying Compassion for Rapid Shifts to Accountability
	5. Personal Productivity and Prioritization in the midst of Chaos or Overload

## Culture of Effective Behaviors & Teamwork

* 1. 5 Steps of Setting Expectations
	2. Closing Expectation Gaps with GAPPA
	3. 6 Steps to Accountable Agreements & Effective Delegation
	4. Failsafe Feedback Framework – Giving feedback that results in agreement and change
	5. Success Factors of Execution (for collective behaviors such as decision making, problem solving, information sharing, cross functional coordination, resource allocation, etc)
	6. Interaction Agreements – Conditional Group Agreements
	7. Advanced Negotiations

## Organizational Structure, Functions and Roles

* 1. Functional Org Structure and Organizational Design
	2. Organizational Charting
	3. Role Clarity and Role Expectations
	4. Role Descriptions

## Org Systems and Process

* 1. Everyday communication process and platforms (Slack, email, phone, etc)
	2. Team meetings
	3. Project management
	4. Reporting
	5. Measurement and Evaluation (KPI’s, dashboards, metric tracking)
	6. Standard Operating Procedures

## Specialized Expertise & Competencies

* 1. Evaluating Core Org Functions and Competencies
	2. Hiring, On‐boarding and Training
	3. Performance Management
	4. Individual Team Member Development (including career dev)
	5. Financial Fluency for Non‐Financial Executives