

Strategic Planning - Setting the Foundation Standard



Major Decision	Guiding Concept	Description	Primary Question	Key Steps	1st Level Detail Steps	Primary Resources & Tools
Purpose	<i>"Begin with the end in mind."</i> Stephen R. Covey	Clear, memorable, and compelling statement of why your organization exists.	Reflecting on your highest aspirations for your business, what legacy do you hope to leave in your industry and community?	CEO Purpose Alignment Leadership Team Alignment Stakeholders Alignment Communication Program	1 - CEO Purpose meeting 2 - CEO Corporate Purpose meeting 3 - CEO & Leadership Team Purpose session 4 - Finalize (Corporate) Purpose Statement 5 - Finalize & Communicate Purpose stories...over time	'7 Habits of Highly Effective People' - Stephen R. Covey 'Playing to Win' - Laflay - Martin 'Start with Why' - Simon Sinek '5 Whys' - Sakichi Toyoda 'Agreement on Exchange of Value' exercise - WITco 'BCQ Messaging' - Rotman
Vision	<i>"The only thing worse than being blind is having sight but no vision."</i> Helen Keller	Clear, memorable, and compelling statement of the bright future you envision when the Purpose is fulfilled.	When you close your eyes and envision the bright long-term future of your organization, what do you see?	CEO Purpose Alignment Corporate Purpose Alignment Leadership Team Alignment Stakeholders Alignment Communication Program	1 - CEO Vision meeting 2 - CEO Corporate Vision Meeting 3 - CEO & Leadership Team Vision session 4 - Test against Purpose 5 - Finalize Vision Statement 6 - Finalize & Communicate Vision stories	'ZEN and the art of making a living' - Laurence G. Boldt 'Manifesting Change' - Mike Dooley 'Mindset: The New Psychology of Success' - Carol S. Dweck 'The Winner's Brain' - Jeff Brown & Mark Fenske 'Success is Clearly in View' workshop/team session - WITco 'BCQ Messaging' - Rotman
Values	<i>"Determine what behaviors and beliefs you value as a company, and have everyone live true to them."</i> Brittany Forsyth	The qualities, traits, and principles a person values, admires, and aspires to, influencing their thoughts, actions, and presented character.	What core values do you hold most dear, and how have they influenced your business leadership and decision-making?	Purpose Statement Alignment Vision Statement Alignment Leadership Team Alignment Stakeholders Alignment Communication Program	1 - CEO & Leadership Team Values session 2 - Test against Purpose & Vision 3 - Finalize Values Statement 4 - Finalize Values Definitions 5 - Finalize & Communicate Values stories...over time	'Corporate Integrity' - Donna Kennedy-Glans 'The 21 Irrefutable Laws of Leadership' - John C. Maxwell 'The Greatness Guide' - Robin Sharma 'Defining Integrity' exercise - WITco 'The Leaders' Values Fuel Everything' workshop/team session - WITco 'BCQ Messaging' - Rotman
Culture	<i>"Culture eats strategy for breakfast."</i> Peter Drucker	Business culture evolves through effective change management, active engagement of people, and commitment to ESG and DEI principles	What do you want people to remember and say about your people and your organization?	Purpose Statement Alignment Vision Statement Alignment Leadership Team Alignment Stakeholders Alignment Values Alignment Communication Program	<i>optional - all-staff Culture survey or session, not included</i> 1 - CEO & Leadership Team Culture session 2 - Test against Purpose, Vision, & Values 3 - Finalize Culture Statement 4 - Finalize Culture Definitions 5 - Finalize & Communicate Culture stories...over time	'Culture Code' - Daniel Coyle 'Teaching the Dinosaur to Dance' - Donna Kennedy-Glans 'PRINCIPLES' - Ray Dalio 'Culture Rules' workshop/team session - WITco 'Decision-Making & Delegation' workshop/team session - WITco 'BCQ Messaging' - Rotman
SWOT	<i>"Across the board, having the opportunity to develop our strengths is more important to our success"</i> Tom Rath	Businesses excel when people put their strengths to work while knowing their colleagues will cover the gaps created by their weaknesses.	What are your peoples' most significant strengths, weaknesses, opportunities, and threats?	Purpose Statement Alignment Vision Statement Alignment Leadership Team Alignment Stakeholders Alignment Values Alignment Culture Alignment	<i>optional - all-staff SWOT and 360 surveys or sessions, not included</i> 1 - CEO & Leadership Team SWOT session 2 - ALERT Risk Management session 3 - PQRS Opportunity Management session 4 - Risk/Opportunity Cost/Benefit & Heat/Cool Mapping 5 - Finalize Ranked Risks & Opportunities	'CliftonStrengths' assessment - Gallup 'Principles You' assessment - Ray Dalio 'SWOT analysis' - Albert Humphrey '80/20 Rule' analysis - Vilfredo Pareto 'SWOT' workshop/team session - WITco 'Talents & Strengths' workshop/team session - WITco
Goals	<i>"Step out of the history that is holding you back. Step into the new story you are willing to create."</i> Oprah Winfrey	Clear, memorable, and compelling goals provide direction, motivate employees, guide decision-making, and bring success through focused and strategic actions.	What 1-year goals must you achieve to ensure your business is in a fully secure "Standard" state and ready to advance?	Purpose Statement Alignment Vision Statement Alignment Leadership Team Alignment Stakeholders Alignment Values Alignment Culture Alignment SWOT Alignment	<i>optional - all-staff Goals/Initiatives surveys or sessions, not included</i> 1 - CEO & Leadership Team SMARTACRE GOALS session 2 - 80/20 Rule testing [cause & effect] 3 - Covey Quadrant testing [urgency & importance] 4 - Compare Risks & Opportunities against Budget 5 - Finalize Ranked SMARTACRE GOALS 6 - Confirm implementation and control details	'The 21 Irrefutable Laws of Leadership' - John C. Maxwell 'Atomic Habits' - James Clear 'GOALS!' - Brian Tracy 'Teaching the Dinosaur to Dance' - Donna Kennedy-Glans 'Risk Management' workshop/team session - WITco 'Opportunity Tackling' workshop/team session - WITco 'SMARTACRE Goals' workshop/team session - WITco