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How To Get Things Done: A Guide To Strategic Planning

By Paul Lemberg

A step-by-step program for creating a strategic plan and tactical plan guaranteed to help you get more of what you want done.

You are pursuing a strategy en route to your vision. Whether it is revolutionary or evolutionary, it does not matter. You are on the road, committedly driving your business in a direction of your own choosing. The important thing is that you have, in fact, chosen this course.

And, once you have made this choice, how are you going to realize this strategy? The answer is just like the answer to "How do you climb Mount Everest?" One step at a time. The way you realize your strategy is one step at a time – the trick, of course, is to know what steps to take, and in what order to take them. This article details an approach to developing a strategic and tactical plan.

Completing the past

The first step in creating a strategic plan is to review and complete the previous past period. For the balance of this article, we will refer to that period as a year, although your planning horizon may be either longer or shorter. You complete the past for two reasons – to learn everything possible from your previous actions, results, and mistakes, and as importantly, so that what ever is left over, whatever issues are hanging over your head, are no longer a burden.

Answer the following questions:

What were your intentions, what were your goals? What did you set out to accomplish? What intentions did you really take action on and which ones did you merely talk about? Specifically, what did you actually accomplish? How effective were you? What percentage of your goals were realized? For instance, if your goal was \$14 million in sales and you reached \$12 million, you were 85% effective. And so on.

What did you accomplish that you didn't intend? What were the unintended side effects? In your opinion, what did you do "wrong"? What did you simply skip?

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One useful practice is to write a detailed, objective history of the past year. Document the year's events and results in journal form. Your records will be a big help – use your date book and your sales ledgers to reconstruct this narrative.

Gather up whatever you learned. Three questions will assist you in this phase. What did you do that worked? In other words, what actions produced the results they were intended to produce? What didn't work – what actions (or lack of actions) produced something other than the desired result? And finally, what was missing – in terms of missing resources, skills, knowledge, attitudes, relationships, etc. – which if you had them would have enabled you to be more successful?

At this point you should be ready to move forward without dragging the past with you.

Set priorities

Using your values, beliefs, vision and strategy as a guide – establish priority issues for the coming year. Presuming your resources are limited, you may not be able to impact all areas of the business at once. Take a look at the following list – in which of these areas do you most want to make a difference?

product development market penetration revenue and profit customer satisfaction technology and product quality intellectual capital productivity strategic relationships new customer growth geographic expansion employee retention community and global impact

Add other areas which are relevant to your business. Then choose which you will focus your attention on. Some prioritizing questions to ask are: What particular area is important? By important I mean that which will move you forward in the direction of your vision, goals, etc. Why is that area important? What will a shift in a particular area provide to the business (or specific categories of stakeholders)? What will not causing that shift cost the business?

Once you have decided in which areas you will focus your efforts on (and also which will not receive much attention), you then establish goals, or measures for success. Here is where things can get tricky. The standard approach to establishing measures for success is to "look around" and try to figure out what is practical. "We did X last year, now we'll do X plus 10%." Then you think about what you know how to do. "Well, we know how to do an extra 10%. Good – that's what we'll shoot for."

The catch is, this approach will get you some pretty practical, incremental, and average results. And while there is certainly nothing wrong with average results, my guess is, that is not why you are reading this article. To get extraordinary, breakthrough results, you have to step outside your normal confines and dream a little. Set your goals by considering what will move you rapidly towards realizing your vision, what will quickly implement your strategy, and go from there. Set goals – establish success measures which will inspire you! Do not think about how you will achieve the measures or goals before you set them. That will only limit your thinking.

Establish Measures and Goals

Establish a clear set of measures for each area of focus. In Product Development you could add two

new products for your target niche, or a new product which will enable you to penetrate a targeted customer segment. In Customer Satisfaction and Quality you could reduce open customer incident time by three days, raise your customer satisfaction metrics from a 7.3 to a 9.0, or eliminate defects in your final product release. You could Geographically Expand into Canada, Mexico or the Northwest.

Employee retention and Intellectual Capital would be impacted by reducing turnover from 14% to 5%, providing 50% more training days for employees and targeting an increase in patents held from 2 to 5. You could increase Market Penetration, Revenues and Profits by adding 25% to the customer base, increasing service revenues 100%, and raising your net profit margin to 23%.

Place a time frame on each measure and turn it into a goal. Total customers increased 25% by September 30th is a clear-cut goal. It fits nicely on the end of a timeline.

Initiatives

You have measures, you have goals – now develop a plan to reach them.

For each measure within an area, invent one or more initiatives which help you reach your goal.

Sometimes the initiatives are relatively simple, such as hire a salesman for the new Northwest territory. There may be alternate options such as contracting with a distributor in lieu of a local sales force. In that case you have to evaluate suitability, costs, resource drain, and the likelihood of success for the various options before committing to one path.

Sometimes achieving the goal will require a series of initiatives, or parallel initiatives. Increasing the customer base 25% may involve direct mail, print and web advertising, two new sales reps, a phone campaign, and working the dead customer file. Alternatively, it could involve acquiring a competitor, or maybe the competing product line. Each of these initiatives then requires its own measures for success. And each one must be evaluated in terms of suitability, costs, and likelihood of success.

Action steps, milestones, and timelines

When you have chosen the suite of initiatives you will pursue, break each into action steps and intermediate results, and place the whole thing on a timeline. Include acquisition of missing resources and skills on the timeline. Set regular milestones to keep the whole effort on track, and have a way to blow the whistle when things get off course.

Develop a tracking system, and update it regularly and often. A big white board or flip chart paper taped to the wall can display your timeline, including measures, milestones, and commitments made by various team members defining what will be accomplished each tracking period. Project management software is useful for complex initiatives – it helps you visualize and account for "dependencies." If you use it, email reports to all participants.

The Merlin Method

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For some of your areas and measures of success you are clueless – you simply have no idea how to achieve the results. In this case, you can use the Merlin Method. Merlin, you may remember, was a magician and prophet who served as counselor to King Arthur. What you may not know is that Merlin did not really predict the future. Legend says Merlin was born as an old man and lived his life growing younger. He was simply relating events which for him had already happened.

The Merlin Method is based on this same principle. Imagine you are standing at the end of a long timeline – you have already achieved your specific goal. Imagine or visualize, how did you do it? What actions did you take? What resources did you secure? Who's help did you enlist?

Ask these questions in a stepwise fashion starting from the end. What was the last significant thing you had to do just before reaching the goal. Put that on your timeline. And just before that, what did you have to do? And just before that? And so on, moving closer and closer in time, right up until the present.

If you were taking a family trip, imagine yourself at your destination. What did you do just before you got there? You exited US 10 at exit 54. And before that? You exited US 15 at Riverside, having driven 67 miles. And before that, you bundled the kids into the car. Before that you put the luggage in the trunk. Before that you packed. Before that you went online and got directions. And so on. Working backwards from the realization of the goal, you have developed a timeline, complete with milestones – working from your collected knowledge and wisdom, but not necessarily from your conscious mind. The Merlin Method can be a very powerful way to generate set of tactical actions to realize your business strategy.

For a reality check, think it through forward. If you add the necessary resources, skills, and knowledge, take each action in turn, and reach each milestone, is that likely to produce the results you intend to produce?

You can even use the Merlin Method to generate alternative plans to evaluate against your other approaches.

Using one or more of these methods, you have developed a strategic and tactical plan – a complete set of strategic priorities, measures, goals, and initiatives, along with action plans, milestones, resources requirements, and timelines – built upon your strategy and designed to realize your vision.

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Three Planning Myths

By Denise O'Berry

Are you — like 70% of business owners — working without a plan? Here are three myths that need to be dispelled about strategic planning for small business.

1. It has to be formal — Not so. The value of a strategic plan for your small business is in putting the ideas on paper, creating action steps that will get you where you want to go and implementing those action steps.
2. I'm too small — Not so. Even a one-person business can benefit from a strategic plan. A strategic plan can help you make decisions about time management and budget. Use your strategic plan to help you determine whether to attend an event or advertise in a publication. It's a check and balance tool.
3. A strategic plan is like a ball and chain — Not so. It's your plan. Too many business owners feel like once it's on paper, it can't be changed. Wrong! It should be an active document that gets reviewed and updated at least monthly, if not weekly. You're the business owner, you wrote it, you know what's happening in your market — adjust as necessary.

Denise O'Berry helps small business owners take action to grow their business. Find out more at

<http://www.whatspossible.com>

Three Planning Myths

Strategic Planning Steps For Optimum Business Management

Being a leader in network marketing

Your Very First Steps To Outsourcing

Communication strategy during a time of strategic planning

Create a Website in 5 Days

Help Your Child Succeed In School

The Ultimate guide to a Multi-Orgasmic Male

Baby's First Year –What Parent Needs To Know

Newbie's Guide to Stop Spam



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