



Strategic Planning Success



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STRATEGIC PLANNING SUCCESS

STRATEGIC PLANNING

PEOPLE
IDEAS
STRATEGIES
RESULTS





“Planning is bringing the future into the present so that you can do something about it now”

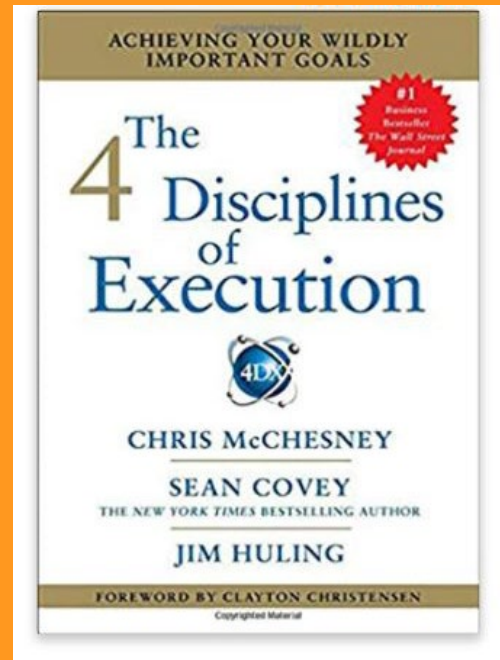
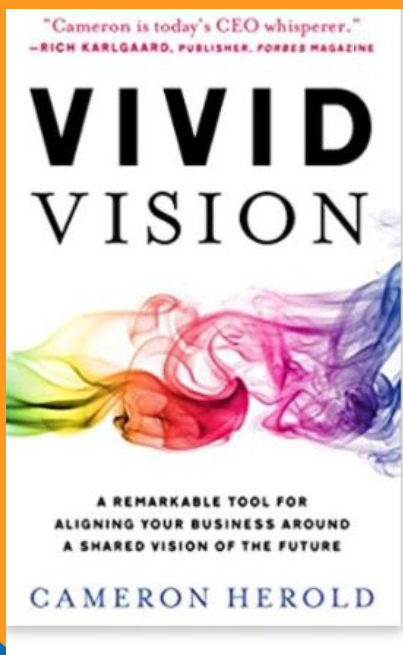
Alan Lakein

Strategic Planning

- ▶ Collaborative
- ▶ Specific
- ▶ Inspiring
- ▶ Clarity

**Strategy is about saying
NO – Not doing everything**







WHY DO IT?

Where are we going?
How do we get there?



If you don't know
where you are going,
any road will get you
there



Source: Lewis Carol



Alignment

Vision

Goals

Strategies

Tasks

My Job

Strategic Planning Process

Phase 1-Thinking

- ▶ Mission
- ▶ Vision
- ▶ SWOT
- ▶ Priorities
- ▶ Alignment

Phase 2- Execution

- ▶ Tracking
- ▶ Cadence
- ▶ Team Engagement
- ▶ Culture
- ▶ Living Documents

Phase 3- Leadership

- ▶ Coaching
- ▶ Communication
- ▶ Ongoing reviews
- ▶ Peer leadership
- ▶ Clear roadmap



Leadership

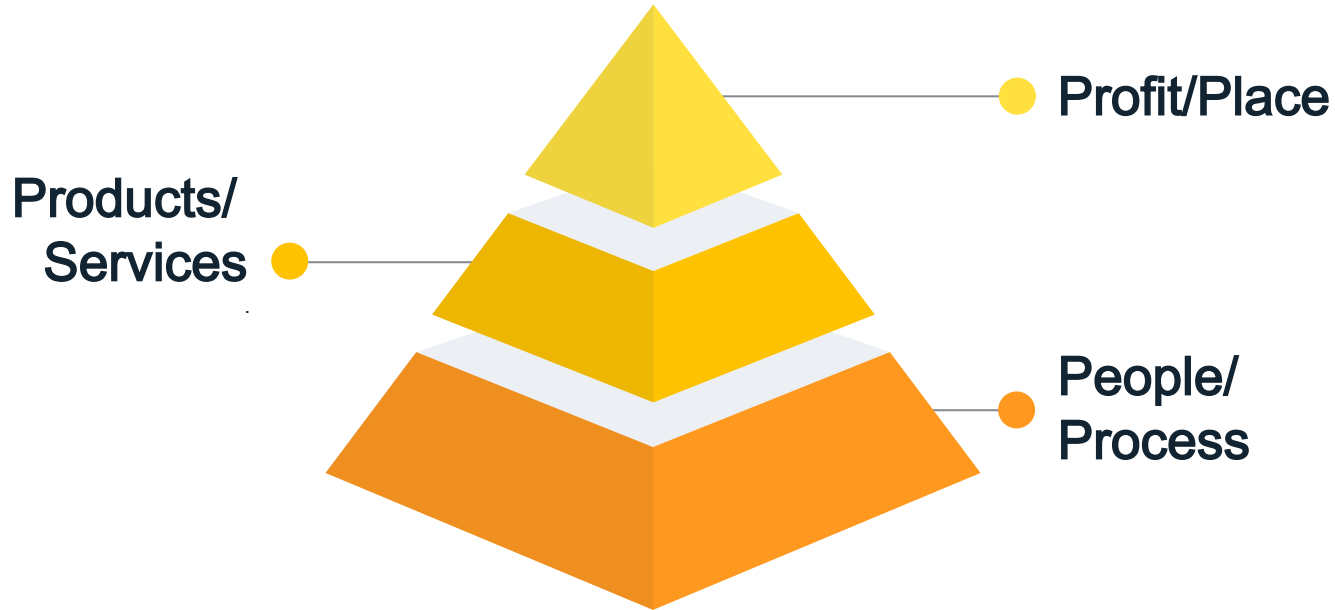
- ▶ Inspire People
- ▶ Empower People
- ▶ Shared Vision
- ▶ Lead Change
- ▶ Drive Results



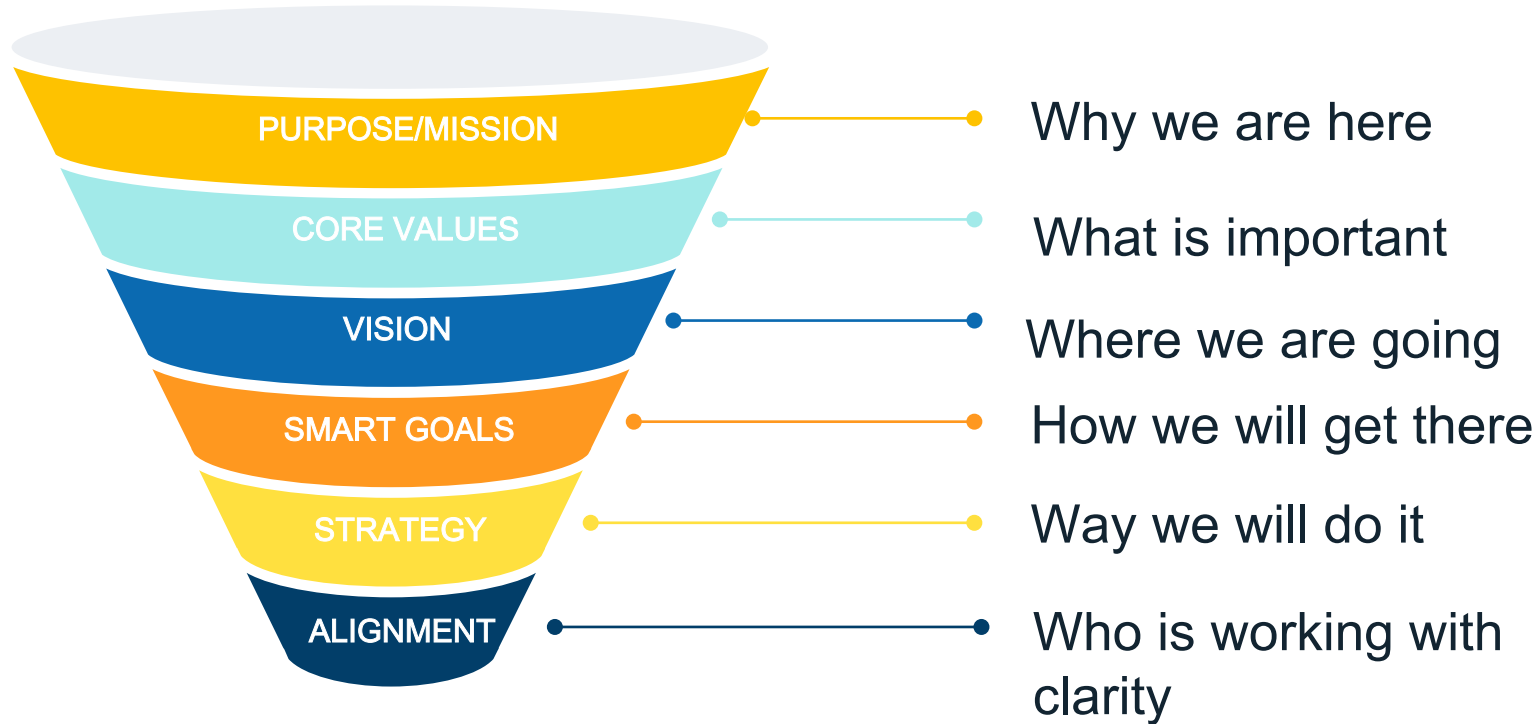
How To Create a Strategic Plan



Where are we going?



Strategic Funnel



Strategic Roadmap

Where did we
come from



What is
coming our
way



What do we
need to get
there



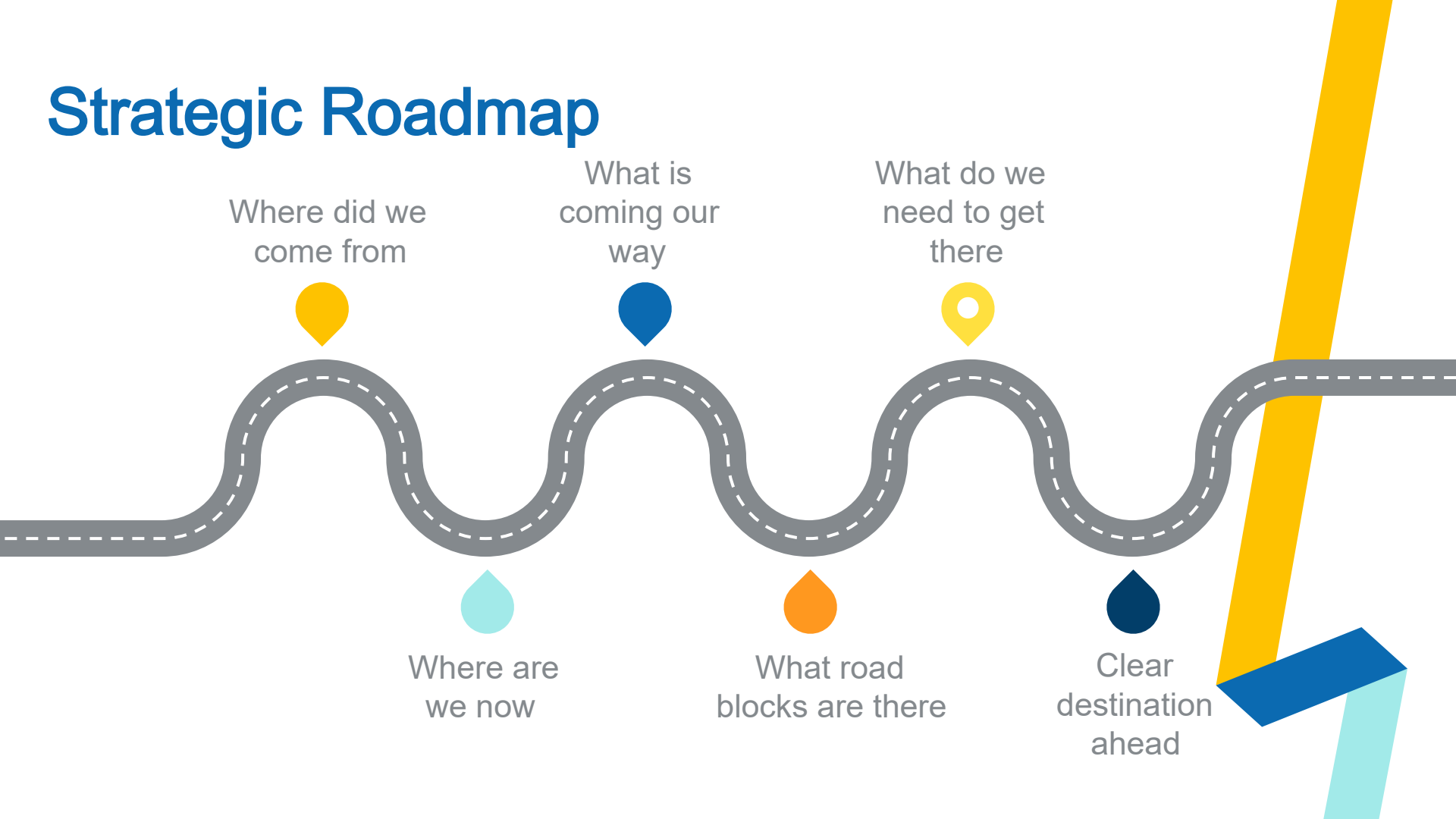
Where are
we now



What road
blocks are there



Clear
destination
ahead



Planning Meeting



SWOT Analysis

STRENGTHS

What are we good at? Why?

S

WEAKNESSES

Where do we need to improve?

W

How can we grow, expand?

OPPORTUNITIES

O

What will get in the way?

THREATS

T

SWOT Analysis

STRENGTHS

What are we good at? Why?



S

WEAKNESSES

Where do we need to improve?



W

Internal – Resources and issues you control

- Employees
- Agility
- Culture
- Product
- Production
- Processes
- Intellectual property
- Financial resources
- Management experience
- Ethics

SWOT Analysis

External – Resources and issues outside your control

- Customer and partners
- Distribution
- Market trends
- Demographic trends
- Time liness
- Geography and weather
- Brand
- Competitive position
- Government regulation
- Political Conditions

How can we grow, expand?

OPPORTUNITIES

O

T

What will get in the way?

THREATS

SWOT Analysis Example

STRENGTHS

- Competitive advantages
- Unique assets, skills, channels, technology
- Defensible intellectual property
- Distribution networks or locations
- Loyal customer base

S

WEAKNESSES

- Gap in capabilities
- Poor competitive position
- Lack of financial reserves
- Weak sales process/results
- Poor employee morale
- Lack of management focus

W

- Competitive weaknesses
- High market demand
- Government contracts
- Strong industry growth
- Niche markets defined

OPPORTUNITIES

O

- Loss of intellectual capital
- Growth of strong competitor
- Financial strength of competitors
- Disruptive technology
- Governmental regulation

THREATS

T

Vision Activity

It's January 2025

We are issuing a press release about the tremendous growth of the business and recent good news .

Write - How We Achieved Success

- ▶ People
- ▶ Process
- ▶ Products
- ▶ Profit
- ▶ Place





SMART Goals

- ▶ Specific
- ▶ Measurable
- ▶ Attainable
- ▶ Relevant
- ▶ Timing

Strategic Roadmap

People
GOALS

Process
GOALS

Technology
Goals

Metrics

Resources

Change
Mangement





How To Keep Strategy Alive



Strategy as a mindset

STRATEGIC PLANNING

PEOPLE
IDEAS
STRATEGIES
RESULTS





Team Building: Tell Your Story

My Role

- Strengths
- Priorities
- Contribution to the team

Commitment

- Align on actions
- Permission to hold others accountable



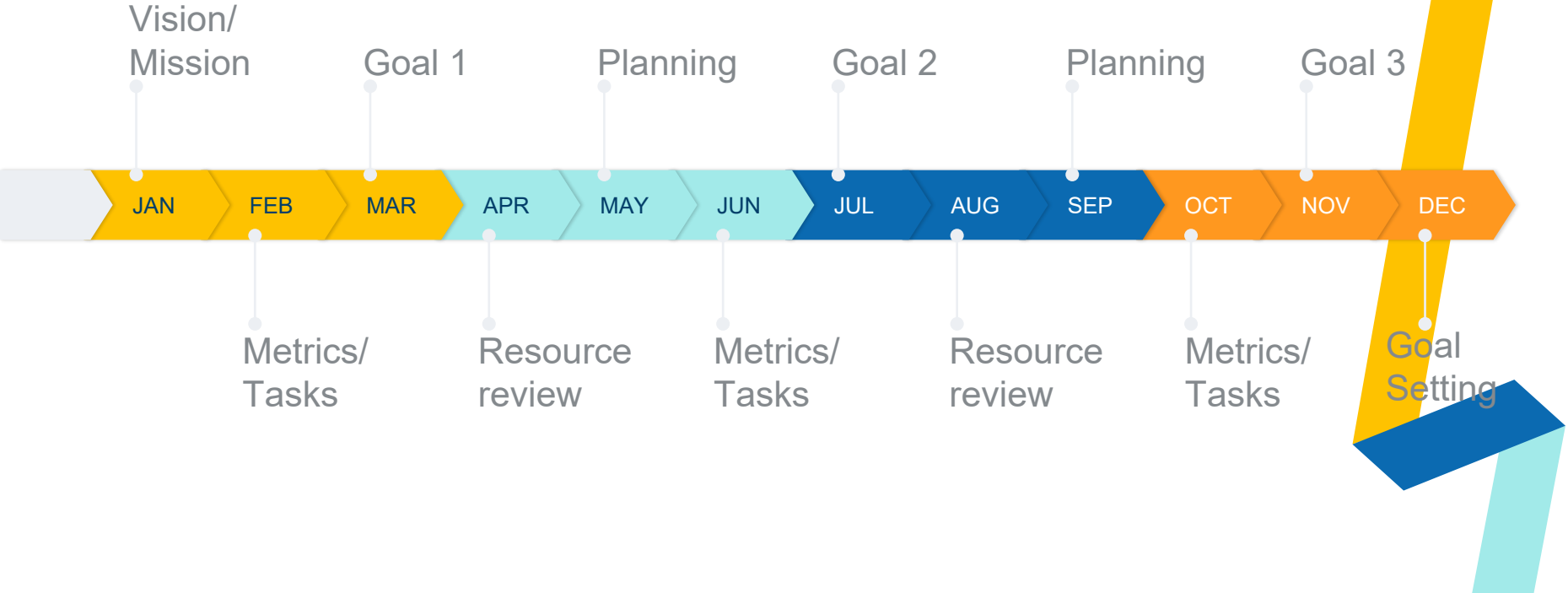
Feedback

- Resonate with daily actions?
- Share examples
- Compliment and challenge

The Time is NOW



Timeline



**What does
alignment look like?**



**Will it make the
boat go faster?**



2000 British Olympic Gold Medalists

I discovered that the only way to reach our crazy goal was with concrete, everyday habits." **Ben Hunt-Davis.**



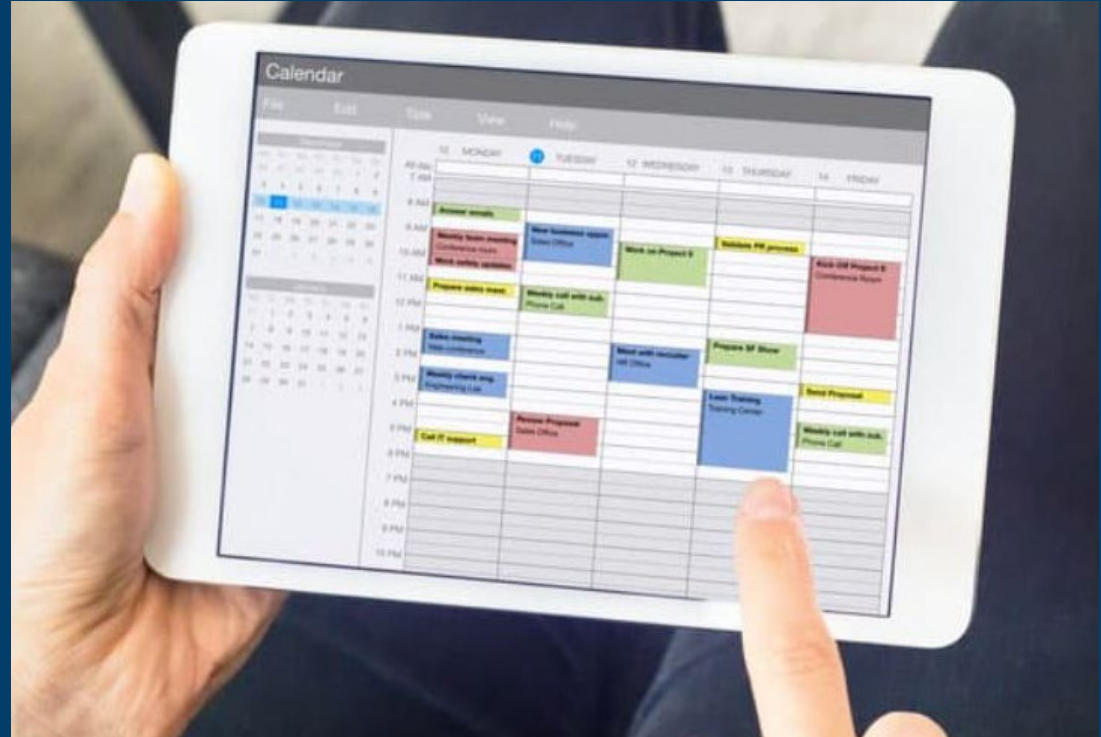
"A fascinating and inspiring book."
Sebastian Coe, OBE.

Ben Hunt-Davis & Harriet Bevanidge

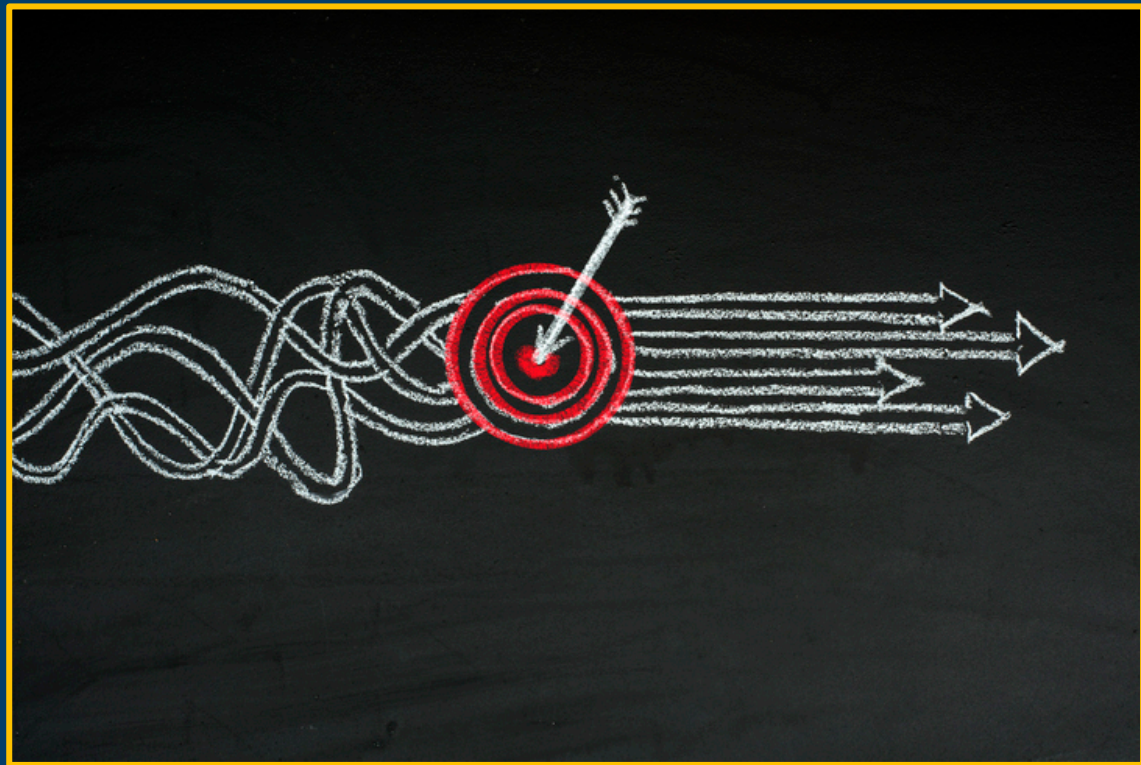
**WILL IT
MAKE THE
BOAT GO
FASTER?**

Olympic-Winning Strategies
for Everyday Success.

What are your daily strategic habits?



How will you enable strategic thinking on your team?



Additional Resources

Strategic Planning Process

<https://www.smestrategy.net/>

<https://www.smestrategy.net/alignment-book>

<https://futuretodayinstitute.com/>

<https://Vivid-Vision-Remarkable-Aligning-Business/dp/161961877X>

Strategic Planning templates

<https://www.smartsheet.com/free-strategic-planning-templates>

<https://www.clearpointstrategy.com/strategic-planning-templates/>

[Bonus templates – email Lritarossi@highrockstrategies.com](mailto:Lritarossi@highrockstrategies.com)

Success starts with Strategic Planning



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