



Strategic Planning Outline

A thorough and versatile strategic planning process.

Plot a primary direction for your company with a practical plan for implementation.

The following outline shows what may be included in the strategic planning process, depending on the client's needs.

Defining Your Future

- ▶ Mission
- ▶ Vision
- ▶ Values

Business Status Planning (Current State)

- ▶ Organization Chart
- ▶ Review of the Fiscal Year
- ▶ Facility Layout
- ▶ Operational Capabilities / Core Competencies
- ▶ Market & Product Descriptions
- ▶ Customer Analysis
- ▶ Business Ratio Analysis
- ▶ SWOT Analysis
- ▶ Lean Business Status (Optional)
- ▶ FINTEL™ Financial and Benchmarking Assessment

Business Strategies and Long Term Goals (Future State)

- ▶ Long Term Strategies & Goals
- ▶ Growth, Sales & Marketing
- ▶ Business Contingency Plans
- ▶ Lean Business Goals (Optional)

Annual Marketing, Sales, and Operational Action Plans (Developing the Future State)

- ▶ Sales Organization
- ▶ Sales and Marketing Plan
- ▶ Sales Support Plans
- ▶ HR Planning and Talent Development
- ▶ Annual Marketing and Sales Plan
- ▶ Performance Success Measures (KPIs)
- ▶ Continuous Improvement Goals and Plans
- ▶ Operational Plan
- ▶ Operations Organization Chart
- ▶ Facility Layout
- ▶ Operational Capabilities
- ▶ Supply Chain Development
- ▶ Capital Planning



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Building Measures that Support the Plan

(Measures to Assure Future Success)

- ▶ Selection of appropriate Key Performance Indicators and measures

Deliverables:

- ▶ A documented Strategic Business Plan stating the mission, vision and values of the company
- ▶ Core competencies that are clearly defined, leveraged and supported by the strategic plan
- ▶ Goals and objectives to support and achieve the business strategies long term goals and annual goals
- ▶ KPIs to measure if the company is moving towards strategic goals and the pace of that progress.

Completion of the Strategic Planning Process occurs over a 6 to 8 week period; implementation varies by company and scope of plan.

About WMEP

WMEP is a private, nonprofit consulting organization committed to the growth and success of Wisconsin manufacturers. A leader in Next Generation Manufacturing, WMEP brings best practices to Wisconsin firms to help them achieve world-class performance through innovation and transformation. WMEP receives financial support from the Wisconsin Department of Commerce, and partners with many public and private organizations to serve Wisconsin manufacturers.

