



Strategic Planning

“Management’s most fundamental responsibility is the appropriate allocation of scarce resources”.

Beinhocker and Kaplan,
“Tired of Strategic Planning”,
McKinsey Quarterly, 2002

About CIS

Consulting & Implementation Services (CIS) is a Management Consulting and Implementation company. Our clients are across a wide range of industry sectors and range from a number of US based Fortune 500 companies - where we reported directly to the Presidents of those companies - to organisations with approximately \$4million turnover.

What is strategic planning

Strategic planning focuses an organisation’s direction by considering the organisation’s external environment and internal constraints. Outcomes include the development of a strategic plan and supporting Implementation Plan.

Why use CIS?

Organisations typically engage CIS to assist them with strategic planning because:

- We provide management with an effective and efficient process that considers and plans for the organisation’s future without unduly distracting management from their day-to-day activities.
- We provide an experienced outsider’s perspective on the organisation’s direction in the context of its competitive environment.
- Through our process, management gain a better understanding of their business, its strategy, the assumptions behind these strategies, major focus areas and an action plan that addresses opportunity areas and limitations.
- The process enables more informed and better decision making.
- The process promotes innovation as new ideas are captured and screened.
- Our involvement helps ensure plans are actioned.
- Our approach is scalable with the level of detail provided in each aspect of the process determined by the needs and budgets of each client.

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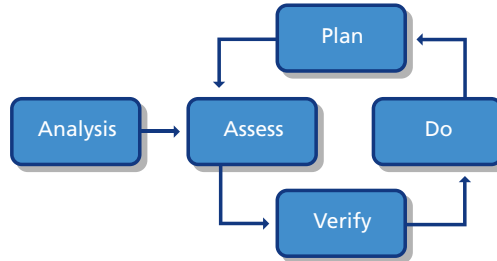
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Our approach

We have a five stage, non theoretical approach to strategic planning, were the focus is on achieving outcomes. The key elements are:



The components of each element are:

Analysis:

Background investigations are completed to understand the competitive environment, industry dynamics and internal constraints.

Assess and Plan:

These phases are usually conducted off-site with the senior management team and sometimes other staff including line managers. The team work through the analysis results and use this information to define the organisation's broad direction for the next 3 to 5 years. Once that is established, major areas of focus are identified; decisions and commitments are made to improve performance in these areas; measures are developed to reflect performance; and initiatives or individual actions are assigned to individuals with supporting milestone time frames. It is important to try to have those people who will be assigned actions involved in the planning phase.

Do:

Staff receive an internal Communication Plan which outlines the organisation's broad direction and how staff activities are tied to the future direction of the company. Owners begin working and completing assigned actions.

Verify and Assess:

Having completed and implemented actions, we now ask: "Have actions achieved what we wanted them to do? What have been the outcomes? What areas need further development and why?" The plan is changed accordingly.

Analysis	Assess	Plan	Do					
	Vision/Mission	Major Focus Areas	Decisions/ Commitments	Key Performance Indicators	Initiatives	Owners	Milestones	Date
Analysis Family/ friends, Career, Finances, Personal growth. To lead a healthy life style which is supported by a stimulating and rewarding career. To maintain balance through quality relationships and interests.	"To lead a well balanced and successful life in each area I enjoy". Social/ Culture	Exercise Low % saturated fats Free time	Run 5km in 25 min Body fat down by 5% Home 6:30 4x p/wk	4 Runs a week Less fried food Delegate more	Me Wife Me	5 km in 28 min Next shopping trip Give scheduling a go	1/5 27/2 26/2	
	Social/ Culture	Pay rise Promotion Meet evaluation goals	Gross income up 10% Promotion Work KPI's	Win Telstra account Action plan KPI's Post in visible spot	Me Me Me	Speak to Sam re my interest Break targets into quarters Put into computer on Monday	28/2 1/3 28/2	
	Social/ Culture	Pay off house Maintain budget	\$400 p/month on house Average expenses \$2,000 p/month	No more Pizza Call US off peak No more pokies	Me/Wife Me/Wife Me/Wife	No Pizza Sat Jim's birthday Meet at the London	26/2 14/2 25/2	
	Social/ Culture	Visits to/from friends Social activities Family contact	1 each fortnight Pub most Fridays Parents for dinner once a month	Schedule dinners Make calls on Mon Organise 40th	Wife Me Me	John and Joy Friday Call Martin Wed Prepare Invite	25/2 3/2 3/3	

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Strategic planning outcomes

There are many outcomes from strategic planning. Two outcomes from the 'Plan' stage are presented in the diagram on the previous page. This example has adopted a personal approach to demonstrate the use of the planning tool.

Implementation

What differentiates CIS from other consulting firms is our focus on providing 'results, not just reports'. We measure our success by looking at what clients have actually achieved. For this reason we pay a great deal of attention to providing practical solutions and consider a solution that is 80% effective and implementable more important than one that is 100% correct but difficult to implement.

Elements of our implementation strategy include:

- A high degree of staff input, especially by those who will be responsible for implementation.
- A long term plan to ensure that what starts with a bang does not end in a fizzle.
- Appointing those who had the idea as the champion of that initiative;
- Assisting with the development of new or modified Operation Plans which are required to assist the Strategic Plan;
- Providing assistance to build the internal infrastructure needed to support implementation. This may include changes to staff position descriptions, developing measurement systems to reflect progress, documenting actions, time frames and owners, setting up formal reporting processes etc.

Tips and Traps

- A lack of strategic planning results in unclear priority for staff.
- Strategic planning and budget planning should not be done together. Having them together puts the focus on short-term financial goals.
- The strategic planning process should involve senior management, as they will have greater ownership of the outcomes.
- Building supporting infrastructure such as changes to management position descriptions to align with the Strategic Plan, developing KPI's etc., are just as important as the strategic planning outcomes.
- The speed and success of implementation will be proportionate to the number of staff involved.
- Clear actions, owners, timeframes and monitoring are needed.
- The planning process should consider new and innovative ideas and not be an update of past planning outcomes.

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