

OVERALL PLAN
STRATEGIC PLANNING AND MANAGEMENT
WORKSHEET

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OUTLINE

I. PURPOSE

- A. What is your vision, your reason for being, your mission, why you are needed, customers served, needs met in community, scope of the endeavor: nationwide, local, accountability, profit or nonprofit?

II. ENVIRONMENTAL ANALYSIS

- A. What is the direction of your industry, your SIC Code?
- B. Who are your primary competitors?
- C. What are international, national, regional, and local statistics as they relate to your business; interest ratios, unemployment, etc.?
- D. Who are your primary customers?

III. STRENGTHS & WEAKNESSES (usually internal)

A. Human Resources/People

B. Facilities/Equipment

C. Patients/Resources Natural

D. Financial

E. Other

IV. ASSUMPTIONS

A. You Have No Control Over

B. Extend Environmental Analysis

C. Usually External

1.

2.

3.

4.

V. OBJECTIVES AND GOALS

Specific, time frame, measurable in key result areas

KEY RESULT/OBJECTIVES/TARGETS

AREA	OBJECTIVES			
	Last Year	This Year	Next Year	Five Year
1. Sales/Total Revenue/Size				
2. Market Share				
3. Return; ROA, ROS, ROI				
4. Quality/Customer Service				
5. Human Resources/People				
a. Turnover Rate				
b. Total Work Force				
c. Training Hours/Employees				
d. Safety				
6. Productivity				
7. Public Responsibility/Ethics				
Other				
8. Other				

Now for each objective, use this format to develop specific objectives, strategy and action.

Key Result Area

Objective

Strategy to achieve objective:

- 1.
- 2.
- 3.

What do I have to do to make it happen:

- 1.
- 2.
- 3.

VI. STRATEGY (General Overall Strategies)

- A. Thinking Stage
- B. Where and How to Commit Resources
- C. Timing
- D. What have to do to achieve objectives
 - 1. Sales/Total Revenue
 - 2. Market Share
 - 3. Return; ROA, ROS, ROI
 - 4. Some Measure of Efficiency and/or Productivity
 - 5. Quality/Customer Service
 - 6. People/Training/Human Resources/Morale
 - 7. Public Professional Responsibility
 - 8. Other Key Result Strategies

VII. OPERATIONAL PLAN

- A. Getting Work Accomplished/What Must Be Done in Short Term
- B. Develop Overall Budget and Support Budgets to Accomplish Overall Plan.
How much is needed during operational year to accomplish objectives?

1. Overall Budget \$ _____
2. Marketing Budget \$ _____
3. Production Budget \$ _____
4. HR Budget \$ _____
5. Staff Support Budgets \$ _____

- C. Capital Budget is Revised and Developed Yearly

X. ANALYSIS

A. How do you measure cultures

XI. ALTERNATIVE SOLUTIONS

A. List of Alternatives

1.

2.

3.

B. Pros/Cons of each—problems/opportunities associated with each.

1.

2.

3.

XII. RECOMMENDED COURSE OF ACTION

A. Alternative Selected and Why It Was Selected

B. Expected Benefit of This Recommendation

C. What Effect Will This Recommendation Have on Performance Income and Balance Sheet Statements

SET UP WAY TO MONITOR HOW YOU ARE DOING AND A WAY TO CREATE ACTION

An action plan for each objective area should be developed. The action plan objectives, strategies, and operational plans into perspective with each other and helps you develop the inter-relationship between the phases. It helps goals come to life with appropriate action.

ACTION PLAN

OBJECTIVE:

STRATEGIES:

- D.
- E.
- F.
- G.
- H.

Action Plan	Person Responsible	Start Date	Date Completed