

# “WORKING EXECUTABLE STRATEGIC PLAN (A)”

(WESP ~ COMPANY LIABILITY INSURANCE)



Although dramatically incomplete for a comprehensive Strategic Business Plan, a 1-Page WESP provides an excellent adaptable base-line enabling very rapid execution of priorities.

**A. Vision / Mission / Values Statements:**

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**B. Competitive Strategic Advantage:**

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**C. Top 5 Business Performance Measurements (KPIs):** Last Year      This Year      Next Year

1.				
2.				
3.				
4.				
5.				

**D. Top 5 Major Business Objectives (Next 12 Months):**      Lead / R. Model      Target Date

1.				
2.				
3.				
4.				
5.				

**E. Top 3 Current Critical Issues / Challenges:**      POC      Critical Date

1.				
2.				
3.				

**F. Key Strategies:**      Lead      Role Model

1.				
2.				
3.				
4.				

**G. Immediate Strategic Priorities / Follow-Up TIP Actions:**

(30-Day Follow-Up)

Follow-Up Action Items	Lead	Date	Status	Next Action
1. _____				
2. _____				
3. _____				
4. _____				
5. _____				

“TO GET WHAT WE WANT... WE MUST CHANGE WHAT WE DO!”

# “WORKING EXECUTABLE STRATEGIC PLAN (B)”

*(WESP ~ COMPANY LIABILITY INSURANCE)*

“TO GET WHAT WE WANT... WE MUST CHANGE WHAT WE DO!” (GOLD-SHEET)

H. Biggest Current Customers:	<u>Our POC</u>	<u>Key Cont.</u>	<u>2007\$</u>	<u>2006\$</u>	<u>#1 Competitor</u>
1. _____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____	_____

  

I. Biggest New Sales Opportunities:	<u>POC</u>	<u>Key Cont.</u>	<u>\$2009</u>	<u>Key Issue</u>	<u>#1 Competitor</u>
1. _____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____	_____

J. Top Direct Competitors:	<u>Sales</u>	<u>Strengths</u>	<u>Our Advantage</u>	<u>Key Professionals</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____

**K. Critique of Current Strategic Planning Program, Suggestions for Additional Improvements:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**L. 90-Day Performance-On-Plan:**

<u>Goals / Objectives</u>	<u>Lead</u>	<u>Date</u>	<u>Status</u>	<u>Next Action</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____

**N. Quarterly Performance Review Schedule:**

**M. Strategic Planning Team:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

<u>Review Dates</u>	<u>Location / Time</u>	<u>Meeting Lead</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

# "SAMPLE WORKING EXECUTABLE STRATEGIC PLAN (A)"

## (WESP ~ COMPANY LIABILITY INSURANCE)



Although dramatically incomplete for a comprehensive Strategic Business Plan, a 1-Page WESP provides an excellent adaptable base-line enabling very rapid execution of priorities.

### A. Mission Statement:

To definitively establish a world-wide industry and target market identity and presence as the most technically advanced, state-of-the-art designers, producers and servicers of premiere quality cooling systems that are supported by the most highly skilled team of talented and experienced customer service professionals found anywhere in the industry today.

### Company Values:

1. Service - To demonstrate an unparallel level of responsive, technically skilled customer service.
2. Design - To demonstrate our superior design engineering capabilities into every system.
3. Quality - To consistently deliver the very highest quality of system to every customer.

### B. Competitive Strategic Advantage: Technical Design and Production Expertise

C. Top 5 Business Performance Measurements (KPIs):	Last Year	This Year	Next Year
1. Number of Units Ordered	77	108	140
2. Total Revenue	\$3,445,427	\$4,875,500	\$6,423,000
3. Parts and Service Revenues	\$982,230	\$1,287,450	\$1,500,000
4. Materials Cost	\$1,343,634	\$1,775,400	\$2,100,000
5. Net Profit	\$620,559	\$949,450	\$1,400,000

D. Top 5 Major Business Objectives (Next 12 Months):	Lead / R. Model	Target Date
1. Web Site Upgraded	Bob Smith	12/15/2008
2. IT System Roll-Out	Barry Wilson	1/20/2009
3. Monthly Sales, Production Quotas	Chris Compton	12/30/2008
4. Strategic Partnership Contracts (2)	John Ells	8/30/2009
5. Add 5 Regional Service Reps	Ray Jones	9/1/2009

E. Top 3 Current Critical Issues / Challenges:	POC	Critical Date
1. Sales Volume	John Ells	12/31/2008
2. Fully Functioning Web Site	Mary Anderson	1/15/2009
3. Upgrade Promotional Materials	Marc Garrison	1/30/2009

F. Key Strategies:	Lead	Role Model
1. Improvement of Product Quality and Customer Value	Bob Smith	Toyota
2. Improvement of Responsive Personal Customer Service	Andy Nelson	Nordstrom
3. Effectiveness of Sales, Marketing & Business Development	Ray Jones	P & G
4. Improvement of Operations and Administration Functions	Sandra Muller	FedEx
5. Improvement of Professional Training and Development	Randy Wall	Starbucks

### G. Immediate Strategic Priorities / Follow-Up TIP Actions:

Follow-Up Action Items	Lead	Date	Status	Next Action
1. Draft of Web Site Revisions	Mary A.	12/10	60%	Brief Bob on Changes
2. Interview 3 New Sales Reps	Sandra M.	12/15	50%	Status of Interviews
3. Sales Materials Drafts	Randy W.	1/15	60%	Review with All for Input
4. Review All Field Phone Plan	Marc G.	1/30	45%	Evaluate Compet. Pricing
5. Annual Strategic Review Meeting	Carl B.	12/10	65%	Confirm All Attending

(30-Day Follow-Up)

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**H. Biggest Current Customers:**

	<u>Our POC</u>	<u>Key Cont.</u>	<u>2007\$</u>	<u>2006\$</u>	<u>#1 Competitor</u>
1. Allied Engineering	Nick Rand	Allen Foster	\$670k	\$590k	Tech Systems
2. Custom Engineering	Al Douglas	Rick Craig	\$490k	\$412k	Tech Systems
3. Foster & Company	Nick Rand	Dick Foster	\$420k	\$387k	Delta Tech.
4. Built-More Manufacturing	Denis Eats	Tom Ingram	\$345k	\$312k	Hamilton Design
5. West Coast Technologies	Al Douglas	Jack Rogers	\$240k	\$127k	Delta Tech.

**I. Biggest New Sales Opportunities:**

	<u>POC</u>	<u>Key Cont.</u>	<u>\$2009</u>	<u>Key Issue</u>	<u>#1 Competitor</u>
1. Harrington Manufacturing	Denis Eats	Mel Jackson	\$45k	Service	Delta Tech.
2. Bill Jones Productions	Al Douglas	Mike Clark	\$30k	Delivery	Munson Engrng.
3. Reliance Manufacturing	Nick Rand	Ed Pace	\$25k	Design	Munson Engrng.

**J. Top Direct Competitors:**

	<u>Sales</u>	<u>Strengths</u>	<u>Our Advantage</u>	<u>Key Professionals</u>
1. Tech Systems	\$27m	40 Year History	Tech Design	Lee King, Bill Meyer
2. Delta Technology	\$38m	Sales Team	Tech Design	Ray Price, Jake Sills
3. Hamilton Design	\$140m	Parent Corp.	Service Resp.	Len Bailey, Bob Dodd

**K. Critique of Current Strategic Planning Program, Suggestions for Additional Improvements:**

1. More input on priorities fro key people in our front lines of customer contact
2. Marketing and business development strategy support
3. Team Incentives considerations
4. Something we can show new potential major customers

**L. 90-Day Performance-On-Plan:**

<u>Goals / Objectives</u>	<u>Lead</u>	<u>Date</u>	<u>Status</u>	<u>Next Action</u>
1. Sales - \$45k in new bookings	John Ells	1/15/09	45%	Proposal to Reliance Out
2. Web Site Upgrades Completed	Mary A.	2/28/09	60%	Proof Final Updates by All
3. Sales Kit 2009 Completed	Marc G.	1/5/09	75%	Competitor Analysis Review
4. Hire 2 Additional Sales Reps	Ray Jones	1/10/09	80%	Set Up CEO Meetings
5. Year End Performance Review	Larry Decker	1/15/09	70%	Sales Team Year End \$,#

**N. Quarterly Performance Review Schedule:**

<u>Review Dates</u>	<u>Location / Time</u>	<u>Meeting Lead</u>
1. Dec. 19-20, 08	Holliday Inn - 8:00 am	Steve Huston
2. Mar. 20, 09	Conference Rm. 8:00	Larry Decker
3. Jun. 22, 09	Conference Rm. 8:00	Sandra Muller
4. Sep. 19, 09	Conference Rm. 8:00	Bob Smith
5. Dec. 15-16, 09	Holliday Inn - 8:00 am	Steve Huston

**M. Strategic Planning Team:**

1. Steve Huston - CEO
2. Larry Decker - CFO
3. Sandra Muller - VP Sales
4. Bob Smith - VP Production
5. Ray Jones - Service Manager