

GOAL TREE (Strategic plan)

I learned about the Center's planning "training model" as a director at Sauk Prairie Healthcare, where it's been a repeat success; the one-page 'goal tree' really got my attention. At Culver's, it helped our management team get and stay clear on the key issues. The plan helped us make real progress in every discipline. - Phil Keiser, CEO, Culver Franchising System, Inc.

Your future on one page

Traditional strategic planning is based on a military model from the 1950's, with terms like mission, strategy, tactic, objective and logistics. The result is often a thick "strategic plan" binder no one uses. The Goal Tree breaks that habit. Used with other tools from the Center, it can be the critical point of focus for everyone's work as a team.



The benefits of collaboration

The Center's tools minimize omissions, improve communications and foster collaboration. The 1-page **Goal Tree**:

- Keeps everyone, including the board, focused on the top issues
- Gives the leader a powerful communication tool
- Traces everyone's paths of delegation and promotion

Difficulty Highest
Estimated time required 20-30 hours over two months
Special skills All of them

Start with your last plan

An easy way to start is simply to abstract your last plan into this 1-page tool. Another simple start is to brainstorm the three key metrics in each discipline, then discuss how everyone depends on each other to succeed. For a more robust plan:

1. Complete the 5-Year Look, Competitor Grid and Trends Outline
2. Link the Goal Tree to the Projects Summary (to move directly into action)
3. Use the Dashboard columns to track and report progress
4. Ask the Center to train you how to use the tools and run the process.

Members can contact the Center for assistance: info@theindex.net

Make it better

Member should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.

LOGO

Strategic Plan: 2020-23

Mission

Our springs bring equipment to life. Their reliability and effectiveness serve silently for decades.

Vision

Five years from now, we will have doubled sales and, more important, we will have professionalized every aspect of our management. Family and non-family managers will enjoy a clear and stable organizational design that lets us make decisions in a timely, well-informed way. All our employees will see a life-long career path here with us.

Top Goals

Net margin from 12 to 17.5%
Repeat sales from 70 to 80%
Plant retention from 67 to 75%

Strategies

1.0 STRUCTURE

Diversify, Accelerate, Thrill

2.0 MARKETING & SALES

Diversify, Accelerate, Thrill

3.0 OPERATIONS

Quality, Speed, Cost

4.0 INFORMATION

Data, Discipline, Immediacy

5.0 HUMAN RESOURCES

Inspired, Flexible, Collaborative

6.0 FINANCE

Lasting Investments in Growth

Performance Goals

- | | |
|-----|---|
| 1.1 | Improve board self-evaluation score from 4.2 to 4.7 |
| 1.2 | Reduce compliance issues from 5 to 2 |
| 1.3 | Introduce 2 new products |

- | | |
|-----|--|
| 2.1 | Increase revenue from new products from 5 to 15% |
| 2.2 | Improve proposal conversion rate from 67 to 75% |
| 2.3 | Decrease customer response from 12 to 4 hours |

- | | |
|-----|--|
| 3.1 | Decrease time to quote from 24 to 6 hours |
| 3.2 | Increase inventory turns from 5 to 7 |
| 3.3 | Increase productivity from \$100K COGS/FTE to \$125K |

- | | |
|-----|--|
| 4.1 | Reduce management reports from 50 to 10 |
| 4.2 | Increase Intranet data opens from 100 to 250/month |
| 4.3 | Reduce office tech lifecycle from 5 to 3 years |

- | | |
|-----|--|
| 5.1 | Reduce plant time to hire from 90 to 45 days |
| 5.2 | Increase cross-trained operators from 20 to 50 |
| 5.3 | Improve rating of family managers to >3.5 |

- | | |
|-----|--|
| 6.1 | Improve DCR from 1.2 to 1.33 |
| 6.2 | Reduce COGS from 62 to 59% |
| 6.3 | Increase Days Cash in Hand from 180 to 240 |

Dashboard

4.5	7%
3	40%
1	50%

Month	Δ
10	50%
70	20%
8	50%

24	0%
6	50%
110	40%

35	30%
150	33%
4.5	25%

80	22%
25	16%
3.0	50%

1.2	0%
60	3%
200	33%

© 2020 CMTP, LLC