

Thank you for this opportunity to discuss how we could help NAME create a strategic plan. We look forward to meeting and learning more about your needs.

### Training Model and the Value of Standards

Leader/managers get much better results when a facilitator gives *them* the tools, and *they* create their own plan. Using the standard GMs Index of Terms and the GMs Toolkit (see [www.theindex.net](http://www.theindex.net)) enables creative collaboration. The Training Model has lasting value: the competencies and tools can be used for planning and managing the projects that result.

### Goals for the Planning Process

Strategic plans must clearly answer three questions: 1) *Why do we do this?* 2) *Where are we going?* and 3) *What's the best way to get there?* The planning process might foster clarity, inclusion and accountability. The plan itself must be a tool of communication and accountability for the board and executives.

### Facilitator and The Center: [www.theindex.net](http://www.theindex.net)

Derrick Van Mell is CEO of The Center for Management Terms & Practices, the standards body for general management. He founded The Center in 2017 after 20 years as a strategic and project planner. The Center is an association, a community of leader/managers. Derrick has a BA, an MBA and an MA and is the published author of two books and dozens of articles on planning and management. He has experience with many different sectors.

### Process and Tools

The planning steps are described in the following pages. The right pace gets the most from the team's talents: meetings are at most two hours and about two weeks apart. We only ask for light preparation for each step. We can also help NAME decide who should participate.

The planning toolset described below can be modified for NAME'S situation, team size and scheduling. See The GMs Toolkit for samples and instructions.

### Relevant Experience

Several recent clients are: ...

- Reference 1
- Reference 2
- Reference 3

Derrick Van Mell  
The Center for Management Terms & Practices  
[dvanmell@theindex.net](mailto:dvanmell@theindex.net)  
(608) 260-9300

## Strategic Planning Steps

*Campfire:* We sometimes kick off with the team sharing stories when the organization did its most meaningful work. *People love to work with others on something bigger than themselves*, and these stories give energy to the planning.

### Meetings 1 and 2: Question Discovery. \$X,000

The team brainstorms all its questions about the future, prompted by the standard questions in The GMs Index, which they then prioritize. This builds engagement, invites different perspectives, cuts off circular conversations, and identifies the critical information needed. We then discuss the implications of the top questions.

*Getting the questions right is 90% of success in planning.*

### Meeting 3: Trends Discussion: \$X,000

The Trends Discussion replaces the cumbersome “SWOT” analysis. There are six relevant types of trends: customer demographics, employee demographics, technology, regulation, macroeconomics and industry concentration. We brainstorm the big trends and then pick the three that will affect NAME most.

### Meeting 4: Competitor Grid. \$X,000

The team must articulate and prioritize how a skeptical and informed prospect would evaluate NAME against its best competitors. Clarity of competitive position tells the planners about how ambitious they can be. It identifies the work needed to protect, reinforce and create meaningful differentiators. See thumbnails on page 4 and 5.

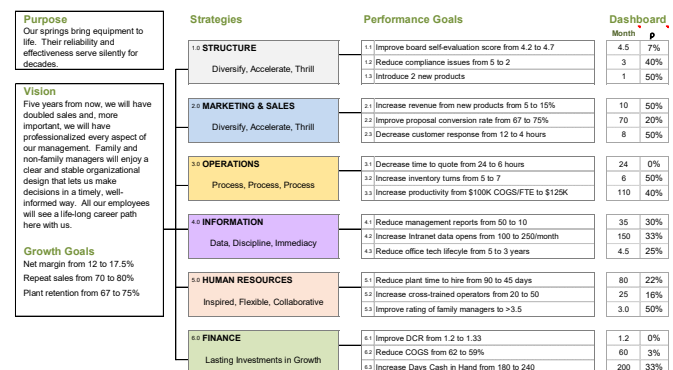
### Meeting 5: Five-Year Look. \$X,000

The Five-Year Look (see thumbnail) is a 1-page table that makes it easy to create a picture of the long-term. This table replaces the often-circular discussion of “vision.”

### Meetings 6 and 7: Goal Tree. \$X,000

The Tree is the heart of the plan. All the previous work prepares NAME to set their long- and near-term goals. This step takes creativity, iteration and reflection.

The 1-page Goal Tree equips the board, owners and managers with a common document to allocate resources, communicate and delegate, maintain focus, and hold themselves accountable.



Analysis contingency

The early questions and analyses can identify the need for new data, analyses or further discussion. It's prudent to have a small planning contingency so the process doesn't stall.

Meeting 8: Projects Summary (execution). \$X,000

People will over-commit, burn out and disappoint each other if they don't know *all* their project commitments. I often meet with executives to identify their projects and assess time commitments. This can lead to hard decisions about projects to stop, delay or redefine. It clarifies time available for the projects needed to fulfill the plan.

**Total fixed fee:** \$XX-XX,000, including Center membership

*"We have our Goal Tree posted all around the facility. It lets me delegate and it lets my team know what our priorities are. The process was better, faster and less expensive than planning processes we'd tried in the past." - CEO*

**Thank you!**

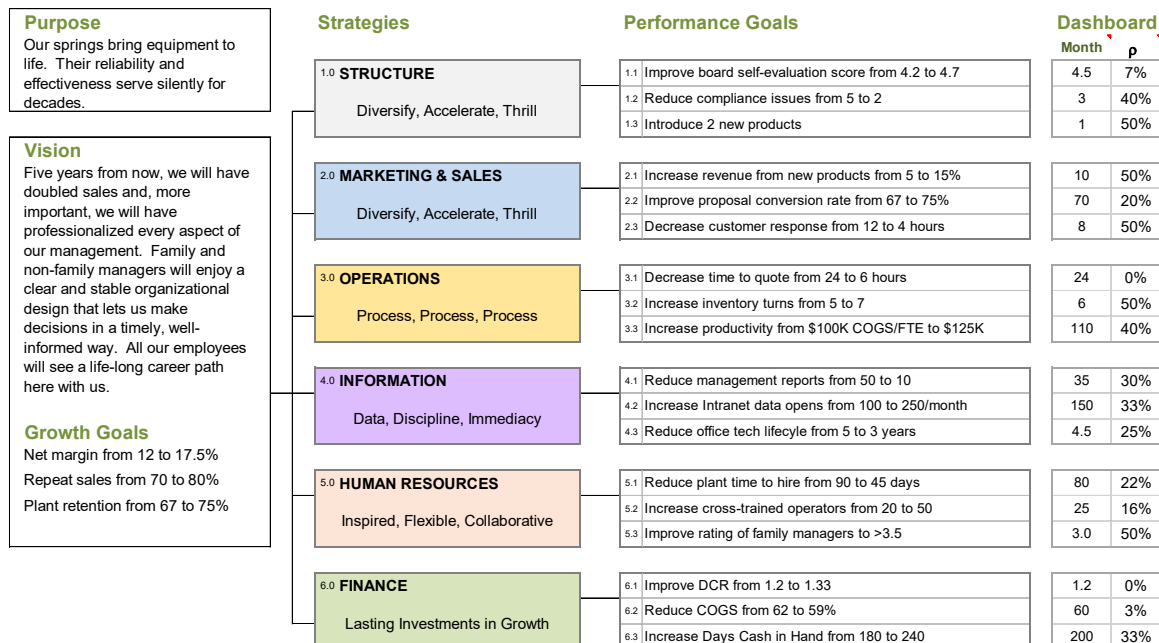
## TOOL SAMPLES

Samples of all our tools are at The GMs Toolkit at [www.theindex.net](http://www.theindex.net). Here are thumbnails of the tools usually used in the Training Model.

### Five-Year Look

	5 YEARS AGO	TODAY	5 YEARS FROM NOW
Key product/service: Revenue: Income: Employees: Customers: Facilities:	<ul style="list-style-type: none"> <li>WidgetOne</li> <li>\$19,000,000</li> <li>\$500,000</li> <li>12</li> <li>100</li> <li>10,000 SF, 1 building</li> </ul>	<ul style="list-style-type: none"> <li>Widget family</li> <li>\$31,500,000 (+66%)</li> <li>\$2,300,000</li> <li>20</li> <li>210</li> <li>15,000 SF, 1 building</li> </ul>	<ul style="list-style-type: none"> <li>Widget, Gadgets, Service X</li> <li>\$45-50,000,000 (+45%)</li> <li>\$5-7,000,000</li> <li>25-28</li> <li>400-450 (10% int'l)</li> <li>Added Milwaukee office</li> </ul>
<b>STRUCTURE</b>	<ul style="list-style-type: none"> <li>Managed by founders</li> <li>Business plan</li> </ul>	<ul style="list-style-type: none"> <li>Strategic plan</li> <li>JV with ACME Supply</li> <li>Advisory board</li> </ul>	<ul style="list-style-type: none"> <li>ESOP</li> <li>National distribution</li> </ul>
<b>MARKETING &amp; SALES</b>	<ul style="list-style-type: none"> <li>Static website</li> <li>3 independent sales reps</li> </ul>	<ul style="list-style-type: none"> <li>Online ordering</li> <li>Regular market research</li> <li>3 inside sales reps</li> </ul>	<ul style="list-style-type: none"> <li>Customer service chat</li> <li>Robust social media</li> <li>Target ad campaigns</li> </ul>
<b>OPERATIONS</b>	<ul style="list-style-type: none"> <li>3 processing machines</li> <li>3 key suppliers</li> </ul>	<ul style="list-style-type: none"> <li>Quality management system</li> <li>ISO 14000</li> <li>First robotics</li> </ul>	<ul style="list-style-type: none"> <li>Outsourced sub-assemblies</li> <li>RFID inventory management</li> <li>Six sigma defect rates</li> </ul>
<b>INFORMATION</b>	<ul style="list-style-type: none"> <li>ERP</li> </ul>	<ul style="list-style-type: none"> <li>New CRM</li> <li>New business intelligence</li> </ul>	<ul style="list-style-type: none"> <li>All cloud-based</li> <li>Updated CRM, ERP, BI</li> </ul>
<b>HUMAN RESOURCES</b>	<ul style="list-style-type: none"> <li>No HR leader</li> </ul>	<ul style="list-style-type: none"> <li>HR Director</li> <li>Employee manual</li> <li>Engagement survey</li> </ul>	<ul style="list-style-type: none"> <li>State of the art HRIS</li> <li>Compensation in top quartile</li> <li>Successor for founders on board</li> </ul>
<b>FINANCE</b>	<ul style="list-style-type: none"> <li>Led by Controller</li> <li>150% debt:equity</li> </ul>	<ul style="list-style-type: none"> <li>Led by CFO</li> <li>75% debt:equity</li> <li>Average LOC balance of \$1M</li> </ul>	<ul style="list-style-type: none"> <li>Risk management program</li> <li>Forecast accuracy of 5%</li> <li>Business value 7X EBITDA</li> </ul>

### Goal Tree



## Competitor Grid

How do we compete--really?

November 12, 2021

We have an Advantage A

We're at a Disadvantage D

Our position is Neutral N

? Don't know

priority (H,M,L) notes		B Schools "Systems"	Small locals Institutes	Large trainers	COMMENTS	
4 PRODUCT						
M	1 Product/service: training	A	D	A	N	We don't compete against the Ivy League
M	Product/service: The GMs Toolkit	A	N	N	N	Technical vs. soft skills. Principles of adult education
M	Product/service: resources	A	A	A	N	All have tools. Can we show ours our better (e.g., 1 page)?
L	Product/service: The GMs Index	A	A	A	A	Editorial guidelines, blogs
M	Product/service: coaching	A	D	N	A	The real breakthrough
M	Product/service: facilitation	A	N	N	A	M&A trend. Topical
H	2 Product/service: Workgroups	A	A	A	A	Workgroups make learning "stick"
M	Customer service	A	N	N	A	Personal attention from Center
M	Quality: Website ease of use	A	A	A	D	
M	2 Quality: flexibility	A	N	D	A	
M	Timeliness:	A	N	N	D	Most offering "asynchronous" classes
H	Ability to deliver on line	D	D	N	D	Will this become less important post-COVID?
PRICE						
H	Basic price: for certificate	A	D	D	D	Resistance to membership fees
M	Pricing flexibility	A	A	N	A	
L	Member discounts	A	A	A	N	Only applies to low-cost items. Change?
L	Payment terms	A	A	N	A	
M	Introductory services	A	N	N	N	
	Other:					
PLACE						
M	Geographic coverage	N	D	N	D	More important to multi-sited organizations
L	Facilities	D	N	N	N	Would be nice to have an office and local meeting room
M	Channels: Affiliations	N	D	A	A	e.g., Michael Best, Lubar
	Other:					
PERCEPTION						
	Awareness	D	D	N	D	What marketing works best?
L	Position as standards body	A	A	A	A	Avoiding jargon hurts our marketing. Feels unsafe?
M	Lubar affiliation	N	A	A	A	Pros and cons. See below
	Reputation:	A	D	N	D	Safety in established brands
	Other:					
PEOPLE						
H	3 Expertise: as trainers, coaches	A	N	N	A	Our expertise in general management is exceptional
M	2 Credentials: experience, training	A	N	N	A	Derrick and other potential trainings have MBAs, etc.
L	2 Organizational design	A	A	A	N	Being an association supports community claim
	Other:					

## Projects Summary

	Priority	Scale	Risk	Status	PM	\$Ks	Hrs	Primary Goals	Comments	2021				2022			
										1QTR	2QTR	3QTR	4QTR	1QTR	2QTR	3QTR	4QTR
STRUCTURE																	
See Project Planners for details																	
Create campus master plan	H	M	H		LM	30.0	200	1.1.1	Facilities, phasing, dock and parking flow								
Run board self-evaluation	M	L	L		DT	0.0	24	1.1.3	Using tool from 3GQ Index 1.4.1 Board of Directors								
Brainstorm new product ideas	L	L	L		BR	TBD	60	2.1.2	Includes facilities, enrichment, wellness, sponsorships, etc.								
MARKETING & SALES																	
Update logo	L	M	L		BD	9.0	80	2.1	Using B&W Advertising								
Complete competitor research	H	L	L		KL	12.0	24	2.5	Telephone interviews								
Run annual customer satisfaction survey	H	M	L		KL	2.0	36	2.2	Use same tool. Share summary with all departments								
OPERATIONS																	
Change steel vendors	M	L	L		BR	20.0	80	3.1	Consider future tariff issues								
Upgrade packaging machine	M	M	M		LM	25.0	120	3.3	Before assembly line rework								
Rework assembly Line X	M	H	H		DT	250.0	1,200	3.3	After changing steel vendors								
INFORMATION																	
Update ERP module X	H	M	H		AA	30.0	80	4.1	Update workflow diagrams essential								
Install and train in business intelligence software	M	L	L		KL	36.0	100	4.2	Combine 3 management reports into 1								
Move office applications to the cloud	L	L	L		KL	12.0	36	4.3	Run Cost/Benefit on Office365 vs. Google								
HUMAN RESOURCES																	
Update HRIS	M	H	M		DR	22.0	120	5.1	Need to add training hours								
Update employee engagement survey	H	L	L		DR	0.0	40	5.2	See 5.3.2 Best Practices								