Sample Planning Document

Status	% Compl	Planning Item	Approval Due	Next Steps	Suggested Changes and Additions	Sponsor Aprvd	Frank Aprvd	Team Infrmd	Notes
🟢	0%	**Vision**							
🟢	⚪	Company XYZ will become the leading worldwide supplier of Widget X to the Manufacturing industry by differentiating on product quality, customer service and distribution excellence.		Create/insert existing ?		☐	☐	☐	
🟢	0%	**Mission**							
🟢	⚪	Company XYZ will		Create/insert existing ?		☐	☐	☐	
🟢	0%	**Guiding Principles/Values**							
🟢	⚪	Company decisions must conform to the Strategic Objective, Guiding Principles, and Working Procedures documents.		Create, edit or insert existing ?		☐	☐	☐	
🟢	⚪	We are the highest-quality business systems consulting firm in the World. We do whatever it takes to ensure the quality of service to our clients is unmatched anywhere.				☐	☐	☐	
🟢	⚪	We draw solid lines, thus providing an exact status of where things stand. Documented procedures are the main defense against gray-area problems.				☐	☐	☐	
🟢	⚪	"Get the job done." Can the employee do his or her job, or is there always a complication of one kind or another? This ability to "get the job done quickly and accurately without excuses or complications" is the most valuable trait an employee can possess.				☐	☐	☐	
🟢	⚪	Employees come first. We employ people who have an innate desire to perform at 100 percent. We reward them accordingly. The natural outcome is we serve our clients well.				☐	☐	☐	
🟢	⚪	We are not fire killers. We are fire prevention specialists. We don't manage problems; we work on system enhancement and system maintenance in order to prevent problems from happening in the first place.				☐	☐	☐	
🟢	⚪	Problems are gifts that inspire us to action. A problem prompts the act of creating or improving a system or procedure. We don't want setbacks, but when one occurs, we think, "thank you for this wake-up call," and take system-improvement action to prevent the setback from happening again.				☐	☐	☐	
🟢	⚪	We focus on just a few manageable services. Although we watch for new opportunities, in the end we provide "just a few services implemented in superb fashion," rather than a complex array of average-quality offerings.				☐	☐	☐	
🟢	⚪	We find the simplest solution. Ockham's Law, also called the Law of Economy, states, "Entities are not to be multiplied beyond necessity . . . the simplest solution is invariably the correct solution."				☐	☐	☐	
🟢	⚪	The money we save or waste is not Monopoly money! We are careful not to devalue the worth of a dollar just because it has to do with the business.				☐	☐	☐	
🟢	⚪	We operate the company via documented procedures and systems. "Any recurring problem can be solved with a system." We take the necessary time to create and implement systems and procedures, and in the end, it is well worth it. If there is a recurring problem, a written procedure is created in order to prevent the problem from happening again. On the other hand, we don't bog down the organization with processes and procedures that target once-in-a-while situations. Sometimes we elect to not create a procedure.				☐	☐	☐	
🟢	⚪	"Just don't do it." Eliminate the unnecessary. Many times, elimination of a system, protocol, or potential project is a very good thing. Think simplicity. Automate. Refine to the smallest amount of steps or discard altogether. Would a simple "no" save time, energy, and/or money?				☐	☐	☐	
🟢	⚪	Our documented systems, procedures, and functions are "off-the-street" smart. This means anyone with normal intelligence and proper level skills can perform procedures unassisted. The real-world evidence of this is we can hire an individual "off-the-street" who has good communication skills and have him or her processing customer service requests within one day. For this result, protocols have to be efficient, simple, and thoroughly documented.				☐	☐	☐	
🟢	⚪	Do it NOW. All actions build on "point-of-sale" theory. We don't delay an action if it can be done immediately. Just like any major retail outlet, we "update contact records and databases at the exact time the transaction takes place." There is no paperwork floating around the office after a physical transaction. We ask, "How can we perform the task NOW without creating lingering details that we must clean up later?"				☐	☐	☐	

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🟢	⚪	We use organizing mechanisms that are always at hand. We prioritize, schedule, and document. The system is always up-to-date and we use it all the time.				☐	☐	☐	
🟢	⚪	Sequence and priority are critical. We work on the most important tasks first.				☐	☐	☐	
🟢	⚪	We double-check everything before release. If a penchant for double-checking is not an innate personal habit, then it must be cultivated. Double-checking is a conscious step in every task, performed either by the individual managing the task, or some one else.				☐	☐	☐	
🟢	⚪	Our environment is spotless: clean and ordered, simple, efficient, functional. No "rat's nests," literally or figuratively.				☐	☐	☐	
🟢	⚪	Employee training is structured, scheduled, and thorough. Assertive client contact is also structured, scheduled, and thorough.				☐	☐	☐	
🟢	⚪	We are deadline-obsessed. If someone in the organization says he/she will be finished with a task or project by a certain date and time, then he or she commits to finishing by that deadline (or, if legitimate delays intrude, he or she advises coworkers well in advance the deadline is impossible).				☐	☐	☐	
🟢	⚪	We maintain equipment and keep it 100 percent functional at all times. If something is not working as it should, fix it now—fix it now even if it's not necessary to fix it now. It's a matter of good housekeeping and of maintaining good habits. This is just the way we do things.				☐	☐	☐	
🟢	⚪	Mastery of the English language is critical. We are aware of how we sound and what we write. We do whatever we can to improve. We are patient as a coworker corrects us.				☐	☐	☐	
🟢	⚪	We study to increase our skills. A steady diet of reading and contemplation is vital to personal development. It is a matter of self-discipline.				☐	☐	☐	
🟢	⚪	As opposed to "doing the work," the department manager's job is to create, monitor, and document systems (which consist of people, technology, procedures, and maintenance schedules).				☐	☐	☐	
🟢	⚪	The CEO/COO oversees department heads and overall systems. It is the CEO/COO's job to direct, coordinate, and monitor managers.				☐	☐	☐	
🟢	⚪	We avoid multitasking activities. When communicating with someone else, we are 100 percent present. We give full attention to the person in front of us (or to the task at hand). We focus on listening and understanding.				☐	☐	☐	
🟢	⚪	When in the office (even if virtual), we work hard on Company business. We keep our heads down; we focus, and in turn the company pays very well. That's "the deal." The workweek rarely exceeds forty hours.				☐	☐	☐	
🟢	⚪	Complete means "complete." Almost or tomorrow is not "complete." In particular, this is germane to administration staff's use of technology.				☐	☐	☐	
🟢	⚪	We strive for a social climate that is serious and quiet yet pleasant, serene, light, and friendly. Our company is a nice place to work.				☐	☐	☐	
🟢	0%	➖ **Strategic Objectives**							
🟢	⚪	We are the highest-quality business systems consulting firm serving the small business community across the globe.		Create/edit ?		☐	☐	☐	
🟢	⚪	Our fundamental strategy is to relentlessly "work" the systems of the business to perfection.				☐	☐	☐	
🟢	⚪	Our guiding documents are the Strategic Objective, Twenty-Nine Principles, and the collection of Working Procedures.				☐	☐	☐	
🟢	⚪	The Company's primary offering is business systems consulting for small businesses throughout the world. Peripheral services are strategic partner resources that align with supporting the needs of our clients who require services outside our core area of focus.				☐	☐	☐	
🟢	⚪	Through intense commitment to our employees, we will contribute to the success of our clients. The consequence of having loyal, smart, hard-working, long-term, and well-compensated staff is superb quality service to customers.				☐	☐	☐	
🟢	⚪	Our business is complex, with many human, mechanical, and computer systems in simultaneous motion. Success depends on refined communication and organizational processes, dedicated staff, documented point-of-sale procedures, first-class office space and equipment, rigorous quality assurance with continuous measurement, assertive innovation, intense planned maintenance/system improvement, aggressive and measured marketing, and relentless attention to detail in every nook and cranny.				☐	☐	☐	

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🟢	⚪	Competitive advantages include a near-flawless level of system support and perfect accuracy, services designed around the unique needs of the customer, thoughtful customer service that is immediate and consistent, the latest high-tech equipment, and personal/corporate integrity. We use extraordinarily efficient communication tools and protocols. We constantly refine and improve all internal systems and mechanisms.				☐	☐	☐	
🟢	⚪	To grow, we proceed with an "if we build it, they will come" philosophy, juxtaposed with assertive marketing efforts.				☐	☐	☐	
🟢	⚪	Although we tightly direct company operations through guiding documentation, we will modify that documentation immediately if an enhancement can be made: "Our operational framework is rigid, but that framework can be modified instantly."				☐	☐	☐	
🟢	⚪	We segment responsibilities into specialized "expert compartments" with appropriate cross-training among departments. We have backup personnel for all positions.				☐	☐	☐	
🟢	⚪	Primary vertical markets include accounting, financial, real estate, online services, information marketing, legal, property management, hi-tech, and any procedurally driven industry needing real time communications.				☐	☐	☐	
🟢	0%	⊟ Key Strategies							
🟢	⚪	Invest in new and updated technology (development)		Define/edit ?		☐	☐	☐	
🟢	⚪	Strengthen our core offerings with strategic partnerships aligned with our clients' interests				☐	☐	☐	
🟢	⚪	Open new markets that closely relate to existing market needs				☐	☐	☐	
🟢	⚪	Pursue strategic alliances with complementary players				☐	☐	☐	
🟢	⚪	Achieve X new clients in 2015 with a minimum value of $Y				☐	☐	☐	
🟢	⚪	Refine our services for major reach into new markets				☐	☐	☐	
🟢	0%	⊟ Major Goals							
🟢	⚪	Achieve sales of $xx million by 20xx		Define/edit/insert?		☐	☐	☐	
🟢	⚪	Report annualized profits of $xx million in 20xx		Define/edit/insert?		☐	☐	☐	
🟢	⚪	Secure xx% of the xx market segment by 20xx		Define/edit/insert?		☐	☐	☐	
🟢	0%	⊟ Programs/Projects							
🟢	0%	⊟ Finance							
🟢	⚪	Establish protocol for project/initiative budgeting		Internal		☐	☐	☐	
🟢	⚪	Raise $X capital by YY time		Determine time frame		☐	☐	☐	
🟢	0%	⊟ Enterprise Initiatives							
🟢	⚪	Develop comprehensive business system enabling deployment of resources when and where needed		Inititive		☐	☐	☐	
🟢	⚪	Initiate PMO for coordinating projects and project standards		See below		☐	☐	☐	
🟢	⚪	Establish departmental and company wide KPI's for performance management		Project		☐	☐	☐	
🟢	0%	⊟ Sales							
🟢	⚪	Create full sales function and processes by product		Project		☐	☐	☐	
🟢	⚪	Hire new marketing manager		Project		☐	☐	☐	
🟢	⚪	Establish 90 day plan for marketing with accountability metrics		Project		☐	☐	☐	
🟢	0%	⊟ Accounting				☐			

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🟢	⚪	Evaluate reporting and determine software integration needs for maximum reporting capabilities		Requires developer		☐	☐	☐	
🟢	⚪	Create consolidated financials dashboard		3rd Party interview		☐	☐	☐	
🟢	⚪	Push button reporting needed for quick analysis of key metrics; (ie, number of registered vs attending students)		Project		☐	☐	☐	
🟢	⚪	Create capital analytics for management purposes		Does this exist?		☐	☐	☐	
🟢	0%	⊟ Project Management Office Initiative							
🟢	⚪	Create PM role for business to support projects with accountability and standards		Frank will facilitate		☐	☐	☐	
🟢	⚪	Establish project standards for procedures, methodologies and technology		Frank will facilitate		☐	☐	☐	
🟢	⚪	Identify internal resource to lead PMO		Internal decision		☐	☐	☐	
🟢	0%	⊟ Customer Service							
🟢	⚪	Implement client liaison program		Initiative		☐	☐	☐	
🟢	⚪	Create processes for coaching / mentoring student engagement, satisfaction and progression path		Project		☐	☐	☐	
🟢	⚪	Create process for ensuring utility transfers occur both on acquisitions and sales		Project		☐	☐	☐	
🟢	0%	⊟ Technology							
🟢	⚪	Evaluate technology for integration opportunities and consolidation		Project		☐	☐	☐	
🟢	⚪	Document existing technical processes to enable training and rapid deployment		Project		☐	☐	☐	
🟢	0%	⊟ Social Media							
🟢	⚪	Establish content management strategy		Internal		☐	☐	☐	
🟢	⚪	Determine LinkedIn strategy for targeted groups		Project		☐	☐	☐	
🟢	⚪	Re-evaluate FB strategy and analyze existing campaigns		Media Consultant?		☐	☐	☐	
🟢	⚪	Create processes and procedures for social media marketing and document for replication		Project		☐	☐	☐	