

# *Strategic Planning and Development*

*Pre-Session Questionnaire*

*2005*

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

*Prepared by*



***Kymera Management Group***

**CONFIDENTIAL**

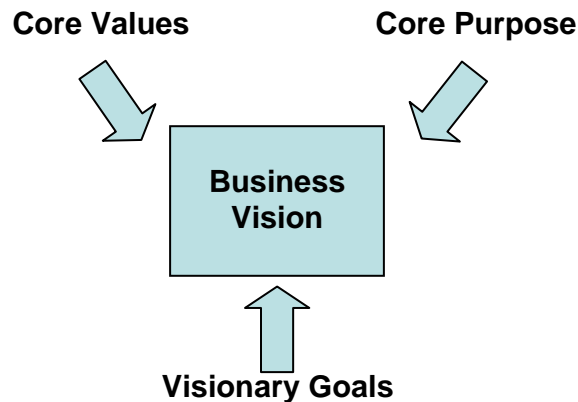
# The Strategic Planning Process

**Strategic Planning** Strategy development and strategic planning is about understanding three things:

- Where are you today? **The Current Situation**
- Where do you want to be tomorrow? **The Corporate Vision**
- How are you going to get there? **The Strategies**

**1. Corporate Vision** This is “the Dream” that a company, its shareholders, managers and employees aspire to attain. It may be a statement, a concept, or just a feeling that the team has of where they want to be in the future. It is typically a grand concept that evokes positive perceptions and emotions, but may be difficult to measure.

The Company’s business vision is typically about understanding 3 things: its Core Values, Core Purpose, and Visionary Goals. The intersection and balance of these elements creates the overall Company’s vision.



**2. Current Situation** The next step in strategy development is determining where you are today – the overall Company’s current situation as it relates to internal and external factors.

**3. The Strategies** Strategies describe the major actions that are required to achieve the Company’s vision. Strategies are based on specific objectives that are measurable and time framed. This is how we achieve our vision.

Some examples of Vision/Mission statements are:

- |                  |                                                                                                                                                                                                                                                                               |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Microsoft</b> | “Enabling people and businesses to realize their full potential.”<br>At Microsoft, we work to help people and businesses throughout the world realize their full potential. This is our mission. Everything we do reflects this mission and the values that make it possible. |
| <b>Starbucks</b> | Establish Starbucks as the premier purveyor of the finest coffee in the world while maintaining our uncompromising principles while we grow.                                                                                                                                  |
| <b>DuPont</b>    | Our vision is to be the world's most dynamic science company, creating sustainable solutions essential to a better, safer and healthier life for people everywhere.                                                                                                           |

**Please spend a little time thinking about your company with the above in mind and answer the questions on the following pages to the best of your ability. Please answer in the blanks provided or click with your mouse on the check boxes.**

## Vision & Strategy Questions

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1. Describe how you would like to see your company in 5 years from now?

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2. At that time, how do you think customers will describe your company?

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3. What services should your company provide its customers now and in 5 years? Why?

**Now:**

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**In 5 Years:**

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4. In your own words, what do you think should be your company's Vision?

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5. What are the top 3 goals that the company should focus on this year and next?

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## Vision & Strategy Questions

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6. How should your company position to itself in 5 years from now?

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7. What are the company's greatest challenges?

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8. What will differentiate the company from its competitors?

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9. What will fuel individual's passion to achieve the above?

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10. Any other comments you may have about the future state or strategies of the company?

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# Situational Analysis Questions

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## **Situational Analysis:**

What are the key trends that are or will affect the company's overall performance?

### **Will Positively Affect the Company's Performance:**

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### **Will Negatively Affect the Company's Performance:**

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What are the company's 3 greatest **Strengths** that will enhance our performance in the next 6 to 12 months?

1. 

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2. 

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3. 

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# Situational Analysis Questions

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What are the 3 best **Opportunities** that the company can immediately take advantage of that will enhance our performance in the next 6 to 12 months (internally or externally)?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

What are the 3 greatest **Threats or Weaknesses** in the company that will diminish our performance in the next 6 to 12 months (internally or externally)?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

## **Summary**

Based on the above questions or other considerations, how do you think the company's current situation **Helps or Hinders** us from reaching its goals?

### **Helps:**

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### **Hinders:**

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# Rating Questions

In your opinion, please **rate** how the company is currently performing in the following areas (please select only one answer per question):

Please check only one:

	POOR or NEVER		GOOD, or SOMETIME	EXCELLENT or ALWAYS		N/A
	1	2	3	4	5	
<b><u>Organization Capabilities</u></b>						
• Industry knowledge and expertise.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Takes advantage of new business opportunities.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effective Human Resources systems.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ingenuity and problem solving capabilities.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Relative low cost of operations.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Depth and breadth of member services and support.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness at attracting new members.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness at retaining existing members.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ability to respond quickly to changes.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effective internal processes and procedures.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Employees have the tools they need to succeed.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Superior computer systems and support tools.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ability to execute strategies and achieve objectives.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ability to handle and anticipate industry changes.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ability to anticipate the needs of members.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Sales and Marketing</u></b>						
• Overall effectiveness of the our sales and marketing efforts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness of the company's consumer promotions.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness of the company's educational programs.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness of the company's store programs.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness of the company's trade event promotions.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness of the company's consumer event promotions.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness of the company's government advocacy efforts.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Effectiveness of the company's tourism promotional efforts.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• A well-defined consumer brand and brand message.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Brand awareness strength .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Rating Questions

In your opinion, please **rate** how the company is currently performing in the following areas:

	Please check only one:					
	POOR or NEVER 1	2	GOOD, or SOMETIME 3	EXCELLENT or ALWAYS 4	5	N/A
<b><u>Financial</u></b>						
• Overall financial strength of the company.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Adequate working capital.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Access to funding.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Team</u></b>						
• Staff morale.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Well-trained or qualified staff.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Dedicated employees.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Healthy team dynamics.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Staff functions well together in meetings.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Stress at the company is generally low.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Good communication between individuals.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Good training programs.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Employees feel motivated.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Employees are well rewarded for personal contributions.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Management</u></b>						
• Strong and effective Board of Directors (BOD).....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• BOD functions well together in meetings.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• BOD achieves its stated goals.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• BOD are experienced and knowledgeable about industry issues and trends.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• BOD provides adequate leadership to motivate members to accomplish goals.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Company's vision is clearly understood among staff.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Company's goals are clearly communicated to employees.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Company's activities are clearly communicated and understood by employees.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ability of BOD and management to make timely decisions.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Ability of management to attract top talent to company.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b><u>Other</u></b>						
• Industry is growing and vibrant .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Company's reputation in community is strong.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>