



Steps to Developing the Strategic Plan

1st Mtg: Introduce the Strategic Plan process; discuss 30-second ‘elevator speech;’” discuss Tracking and Benchmarks.

Assignment: Develop and write down your 30-second elevator speech; e - mail me your 30-second elevator speech, practice and memorize it; each week for the next 10 weeks: do the most important 1) marketing activity; 2) sales activity; and 3) internal activity; to grow your business. Measure all activities via Tracking and Benchmarks; read What’s Your Phrase that Pays?

2nd Mtg: Review results of assignment; discuss the Mission and Vision Statement

Assignment: Continue to practice your 30-second elevator speech; develop and write down your Mission and Vision Statements; do most important marketing, sales and internal activity to grow your business. Measure results via Tracking; prepare to bring employees and stakeholders into the process. Read Phrase.

3rd Mtg: Review results of assignment; discuss the Value Statement

Assignment: Present your 30-second elevator speech whenever possible; revise your Mission and Vision Statement; develop and write down your Value Statement; do the most important marketing, sales and internal activity to grow your business; apply Tracking; begin completing *Situation Analysis (SA)* and SWOT analysis. Each sales rep should join a networking group. Read Phrase.

STEPS TO DEVELOPING THE STRATEGIC PLAN, CONTINUED

4th Mtg: Review results of assignment; discuss Positioning Strategy

Assignment: Present 30-second elevator at every opportunity; revise statements; develop and write down your Positioning Strategy; do the most important marketing, sales and internal activity to grow your business and Track; continue completing the SA and SWOT; bring employees and stakeholders into process; each sales rep should create a complementary marketing group and hold meeting. Read Phrase.

5th Mtg: Review results of assignment; discuss Goals

Assignment: Present 30-second elevator speech at every opportunity; revise all statements; refine your Positioning Strategy; develop and write down your goals-they must be Smart, Measurable, Attainable, Realistic, and include a Target date; do the most important marketing, sales and internal activity and Track; continue working on SA and SWOT. Read Phrase.

6th Mtg: Review results of assignment and each aspect of Strategic Plan development completed so far; are we on track?

Assignment: Continue revisions as usual; commit to goals; employees and stakeholders should be involved by now; continue working on SA and SWOT. Read Phrase.

7th Mtg: Review results of assignment; discuss Critical Success Factors (CSF)

Assignment: Present 30-second elevator speech at every opportunity; revise statements and Positioning Strategy; review develop and write down the Critical Success Factors (4-8) and prioritize; identify obstacles to achieving each CSF; brainstorm all possible solutions; do most important marketing, sales and internal activity and Track; complete SA and SWOT; read Phrase.

STEPS TO DEVELOPING THE STRATEGIC PLAN, CONTINUED

8th Mtg: Review results of assignment; discuss Action Plan

Assignment: Present 30- second elevator speech at every opportunity; revise all statements; review Positioning Strategy, Goals and CSF's; create Action plan for each department and Benchmark and Track results; do most important marketing, sales and internal activity and Track. Read Phrase .

9th Mtg: Review results of assignment; discuss Financial Assessment

Present 30-second elevator speech at every opportunity; final revision of all statements, Positioning Strategy, Goals, Critical Success Factors, and Action Plan. Determine if implementing the Strategic Plan, as it has been developed, makes financial sense and if not, refine the Strategic Plan. Implement the Action Plan for each department and Track – be sure to include Benchmarks.

10th Mtg: Determine a date – within 60 days - to meet to review and, if necessary, to revise the Strategic Plan, to discuss the results of any Actions taken to date, and plans for the next Actions to be taken.

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