**New Next® Planning Preparation**

**Business and Leadership Evaluation**

**Business Success Evaluation**

* What was your revenue in the past year?
* What were your expenses in the past year?
* What were your profits as a percentage of revenue in the past year?
* How satisfied were you with your performance in each of these areas?

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|  | Very Dissatisfied | Dissatisfied | Somewhat Dissatisfied | Somewhat Satisfied | Satisfied | Very Satisfied |
| Revenue |  |  |  |  |  |  |
| Expenses |  |  |  |  |  |  |
| Profits |  |  |  |  |  |  |

* What are your business growth goals for the coming year?
* How will you achieve those goals?
* Organic growth?
* Merger or take-over?
* New products or services?
* New markets or market expansion?
* Other?

What are your organization’s

* Strengths?
* Weaknesses?
* Opportunities?
* Threats?

What is the profile of your ideal customer?

* Who are they?
* What are the important, urgent, and/or complex problems you can help them solve?
* What opportunities can you help them capture?
* What is important to your customer’s customer? How can you help them solve that problem or take advantage of that opportunity?
* Where are they most likely to look to find the product or service you provide? What is the best way to reach them?
* How would you rate your business on each of the following?

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|  | Poor | Marginal | It depends on the day | Good | Excellent |
| Being aligned and executing around a shared vision, goals, and plans (strategic & operational) |  |  |  |  |  |
| Embracing and living your company’s values |  |  |  |  |  |
| Creating a positive environment that attracts and retains top talent |  |  |  |  |  |
| Delivering a distinctive customer experience |  |  |  |  |  |
| Remaining focused – not being distracted |  |  |  |  |  |
| Executing flawlessly against our plan and expectations |  |  |  |  |  |
| Learning from mistakes – solving 100 problems 1 time not 1 problem 100 times |  |  |  |  |  |
| Staying externally focused on what it takes to make customers successful |  |  |  |  |  |
| Treating the business as if it was their own – being stewards of your resources |  |  |  |  |  |
| Looking to the future and embracing continual growth and change |  |  |  |  |  |
| Leveraging partnerships internally – breaking down silos and working as a team |  |  |  |  |  |
| Leveraging partnerships externally to expand opportunities |  |  |  |  |  |
| Embracing change that makes them and the company better |  |  |  |  |  |
| Being accountable – accepting responsibility for performance and results |  |  |  |  |  |
| Growing and developing talent that can take your company into the future |  |  |  |  |  |
| Seeing goals and projects through to completion |  |  |  |  |  |
| Addressing performance that does not meet expectations |  |  |  |  |  |
| Challenging everyone to continually improve |  |  |  |  |  |
| Pursuing the best – not being satisfied with less than world-class performance and results |  |  |  |  |  |
| Responding to adversity in a positive manner |  |  |  |  |  |
| Being willing to make tough decisions and communicate them with respect and dignity |  |  |  |  |  |

* How would you rate your business on each of the following?

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| --- | --- | --- | --- | --- | --- |
|  | Poor | Marginal | It depends on the day | Good | Excellent |
| Technology that enables us to operate efficiently and effectively |  |  |  |  |  |
| Optimized work processes |  |  |  |  |  |
| Talent recruitment and retention |  |  |  |  |  |
| Talent planning and development |  |  |  |  |  |
| Operational capacity and capability to give your clients and the business what they need |  |  |  |  |  |
| Performance management processes |  |  |  |  |  |
| Strategic plan development |  |  |  |  |  |
| Workspace |  |  |  |  |  |
| Investment in equipment |  |  |  |  |  |
| Investment in marketing |  |  |  |  |  |
| Resource alignment and allocation |  |  |  |  |  |
| Project planning and execution |  |  |  |  |  |
| Financial controls and systems |  |  |  |  |  |

**Competitor Assessment**

* Who are your primary competitors?
* What do they do better than you?
* What differentiates you from your competitors?
* What are the opportunities to win against your competitors that you are missing?
* What do your competitors say about you?

**Business Analysis:**

* What are the areas of your performance and behavior that you need to continue to be more effective at achieving your goals?
* What are the areas of your performance and behavior that you need to improve to be more effective at achieving your goals?
* What are the areas of your performance and behavior that you need to increase to be more effective at achieving your goals?
* What would be different about your business if it was running exactly as you wanted it to run?
* What excites you about the future of your business?
* What worries you about the future of your business?
* Where are you vulnerable to losing in the marketplace?
* Where are the opportunities for you to exploit the weaknesses of your competitors?
* What role do you see an outside resource contributing to helping you leverage opportunities and/or overcome a weakness or threat?

**Action Plans**

What should action(s) you take in each of the following areas to achieve the success you desire?

* In improving or increasing your revenue?
* In controlling or leveraging your expenses?
* In building a culture that allows you to win in the marketplace? Living your core values?
* In creating and consistently delivering a distinctive customer experience?
* In targeting and attracting your best customers/clients?
* In optimizing your operational and financial processes?
* In providing the level of leadership that you and your company need to flourish?

**What is your action plan?**

* In the next 30 – 45 days?
* In the next 60 – 90 days?
* In the next 3 – 6 months?
* In the next 6 – 12 months?
* In the next 12 – 24 months?

**The Quick and Dirty Strategic Plan**

**Strategic plans create focused action over a defined period to help you:**

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| * Achieve your purpose and vision | * More effectively live your core values |
| * Overcome a weakness or threat | * Take advantage of a strength or opportunity |

**Time horizon: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Annual with Quarterly updates recommended)**

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| **Company Overview** | **Environmental Analysis** |
| Purpose: | Strengths: |
| Vision: | Weaknesses: |
| Core Values: | Opportunities: |
| Competitive Position: | Threats: |

**Customer/Client Perspective**

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| --- | --- | --- | --- | --- | --- |
| **Goal** | **Accountable** | **Responsible** | **Consult** | **Inform** | **Due Date/ Milestones** |
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**Operational Process Perspective**

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| **Goal** | **Accountable** | **Responsible** | **Consult** | **Inform** | **Due Date/ Milestones** |
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**Capacity & Capability Perspective**

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| **Goal** | **Accountable** | **Responsible** | **Consult** | **Inform** | **Due Date/ Milestones** |
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**Financial Perspective**

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| **Goal** | **Accountable** | **Responsible** | **Consult** | **Inform** | **Due Date/ Milestones** |
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**Culture Perspective (the habits by which you operate)**

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| **Goal** | **Accountable** | **Responsible** | **Consult** | **Inform** | **Due Date/ Milestones** |
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