

The Quick Plan

If you are here it's probably because you're a little bit stuck or looking for a new perspective.

This is a simple exercise for busy business owners who need a reset. The Quick Plan is not a substitute for an in depth strategic or business plan, but in some ways it can make things clearer.

Just one sentence in each section of the Quick Plan will help you capture a picture of where your business is, and where it's heading. If you want to steer in the right direction, you've got to know where you are!

So take a pen and paper and 20 minutes and see what insights you can derive from your answers:

COMPANY:

The What & The Why

Vision

Where I see the organization going long term The vision makes it powerful. Be able to lead others with it.

Core Values

The underlying beliefs or ethics that you are committed to. What drives the culture of your business.

Mission

A one-sentence, clear, concise statement that says who the organization is (the name, and what type of business it is), what it does, for whom and where. At its most basic, the mission statement describes the overall purpose of the organization. How the ultimate end is reached.

Goals

Goals describe a desired end state. In themselves they are not measurable or actionable, and they don't have a specific timeframe associated with them. They're like newspaper headlines declaring what you would like to see happen in the future: "Company achieves market leadership position in the widget industry," for example.

Objectives

Measurable Objectives—Bringing Goals to Life Goals become actionable only when they have measurable (quantifiable) objectives associated with them. An objective states exactly what needs to be done to achieve the goal, in what timeframe and according to what metrics. Objectives set very specific bars for the group, clearly defining the parameters and measurements for success. Each goal has a set of objectives associated with it. All objectives must be achieved to claim the goal has been met.

The Work Plan

Strategies

Objectives are realized when a set of detailed strategies is linked to them. A strategy describes an approach the group will take to achieve a particular objective. It states: here's how we're going to achieve the objective given the resources and timeframe available to us. To capture 35% market share, for example, the group will restructure the corporate pricing model in order to go after a whole section of the market it was unable to target previously, thus grabbing additional market share.

Plans & Tactics

Once you have developed your system of goals, objectives and strategies, you can plan and budget for activities to support them. Tactics are the actual deliverables—programs, materials, presentations, etc. that will support the achievement of your goals. You should be able to trace each tactic back up to your plans and mission.

Priority Items

The hot tactics! What needs to happen now?

Tracking & Evaluation

What do we need to track, and how did we do?
It's time consuming to get accurate data without tracking/measuring systems in place, so save time and make better decisions by putting a system in place if you haven't already done so. Tracking systems need to be reviewed and updated as your business and conditions change.