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Simple Strategic Planning for 2018

Step 1: Create 3-5 key initiatives for the year. There is a correlation between success and fewer initiatives. Translated, the fewer initiatives you have, the greater likelihood of hitting your targets. Make sure that each initiative is something that aligns with a strength of your organization and evokes a “Hell yeah!” from all involved in its execution. An initiative should have a date and measurable metric associated with it. For example, we will sell \$2,000,000 of X by Y.

Step 2: Determine what projects need to be in place to support the accomplishment of each initiative. Note that 1 initiative may have multiple underlying projects. This step is very important. For example, we will create a marketing campaign to promote X to our top 100 customers. We will introduce a new and improved feature of X within 30 days.

Step 3: What funding needs to be in place for each initiative and supporting projects? Without the right allocation of budget, the accomplishment of the initiatives may be greatly compromised.

Step 4: Assign owners to each initiative and underlying projects. Dependent on the size of your team and each member’s respective expertise, you might assign different people to own initiatives and projects. Ensure that each assigned owner is very clear what success looks like, what funds have been allocated, and who’s responsible for what. Accountability for all responsible parties must be crystal clear.

Step 5: Establish milestones for each initiative. Doing this will ensure that each initiative is trackable throughout the duration of the campaign. For example, we will sell \$500,000 dollars of X each quarter.

Step 6: Create a cadence of team meetings for each initiative. Typically, each team would meet weekly to ensure accountability and steady progress. Add the meeting schedule to each team member’s calendar from the outset.

Each office independently owned and operated.

Step 7: After the first quarter, measure success against the established milestone. Determine if adjustments need to be made.

*Additional considerations: Should an executive sponsor be assigned to an initiative to show the team you mean business?

Does certain technology need to be in place for an initiative? That may be a project.

Be very careful about eliminating or adding initiatives once the process has begun as this may send the wrong signal to your team. Clarity of purpose is a stabilizing and motivating principle. Organizations that don't have clarity of purpose, don't win on purpose.

Don't give up even if you struggle with accomplishment in the first year. Many organizations do not go through a process like this. Thus, there will be growing pains, which may hamper success. However, once your organization goes through a full cycle, they will be well equipped and have the right mindset to follow this process successfully year in and year out.