**Fundamentals of Effective Business Planning**

Learning objectives:

Each participating member of this program will learn the key fundamentals to effective Business Planning and leave with tools and a 'blueprint for a roadmap' to create your own business plan for future years. Course content will help the Leadership Team to:

→ Define your business' view of success and prioritize the activities that will make this view a reality

→ Discover strategies and operational ideas that foster creative thinking and explore how your Leadership Team can create a culture of innovation

→ Learn the fundamentals of Vision, Alignment, and Execution

Effective business planning is a critical process successful organizations and businesses must undertake to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment. Effective business planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful.

X5 Management will facilitate a series of courses to guide your Leadership Team in learning the process by which to develop a business plan that brings clarity on purpose, priorities, and that drives path forward to your desired results.

**MODULE 1**

**Vision** – An imagined future of your business

How to clearly lay out a 1 to 3-year plan with specific targets and desired outcomes.
Creating the vision is about future value for your organization and your clients and allows the team to focus on this future state.

Vision is critical as it:

- Expands assumptions about what can be done
- Provides purpose for the organizations, teams, and individuals
- Drives the development of specific, vision-supporting goals
- Unifies the team

Learn how to have your leadership team develop best practice VISION behaviors that include:

- Remaining Open
- Prioritizing the Big Picture

Being Adventurous
- Speaking Out
- Seeking Counsel
- Exploring Implications

We will learn how to set targets and collaborate with the team on creating a best path forward.

As a scenario we will role play and conduct exercises with:
Year 1 Goals
Year 3 Goals

**Alignment** - How to gain buy-in from your team and entire organization

Alignment is important as it:
- Sets the stage by proposing a plan for effective implementation
- Provides a forum for questions and concerns
- Unites the team behind the vision
- Generates excitement for the vision

Learn how to have your leadership team develop best practice ALIGNMENT behaviors that include:
- Explaining rationale
- Structuring messages
- Exchanging perspectives
- Being receptive
- Being expressive
- Being encouraging

**Execution** – Turning the imagined future condition into reality

Execution is important as it:
- Propels the development of concrete strategies
- Makes the vision actionable to achieve established goals
- Gives people a sense of achievement
- Fulfills the promise of the vision

Learn how to have your leadership team develop best practice EXECUTION behaviors that include:
- Being driven
- Initiating action
- Providing a plan
- Analyzing in-depth
- Addressing problems
- Offering praise

## MODULE 2

### SWOT analysis
Focusing on strengths, weaknesses, opportunities, and threats, SWOT analysis is a framework used to evaluate a company's competitive position and to develop overall business planning. The analysis assesses internal and external factors, as well as current and future potential.

### Goals and Objectives
- What do we measure and how to effectively track it?
- Using effective concepts from the book, "MEASURE WHAT MATTERS" by John Doerr, we will explore and learn about the concepts of OKR's:
    - **O**bjective (Overall direction and goals established)
    - **KR** - Key Results (How to achieve the objectives)

### Areas of focus for your business
We will tailor this to meet the needs of your business, including the areas of:
- Sales
- Marketing
- Manufacturing
- Efficiency
- Human Capital
- Values and Corporate Culture (Internal communication excellence)
- Diversification
- Innovation/reinvention

You will learn to apply the concepts of OKR's with each area of your business.

### Template for a detailed and actionable plan
Distribution of a collective Results Roadmap™ to each participant and facilitate a session to finalize The Team Desired Result(s).

The Desired Result(s) will be established prior to the Team Planning Sessions. This is done so that the planning sessions are energized with focus and purpose. (Identifying the Desired Result(s) in advance of the session avoids draining energy and consuming value time while we are in planning mode.)

A successful Desired Result is:
→ Desired by most or all senior managers
→ More conceptual than concrete
→ A motivator or inspiration for the team to focus on going forward

The Results Roadmap™ experience is created by using the tool during coaching and facilitating work and helps each senior manager uncover the thinking and behaviors that will support or undermine their ability to achieve desired results.

**Benefits**

Using the Results Roadmap™ offers the following benefits:

- Improved ability to achieve results
- Accelerated progress in creating a Desired Result(s)
- Clear strategies and actions
- Reduction and removal of obstacles
- Increased self-awareness
- Reusable learning
- Broad applications

The Results Roadmap™ engagement is divided into four parts:

1. Preparation and advance work
2. The Results Roadmap for Teams™ session
3. Immediate follow-up
4. Continuing work with the team and leader, as required

*Please note: Mike Mack/X5 Management Inc. are licensed to use the material and processes of The Results Roadmap™ based on a systems model called The Results System™.*
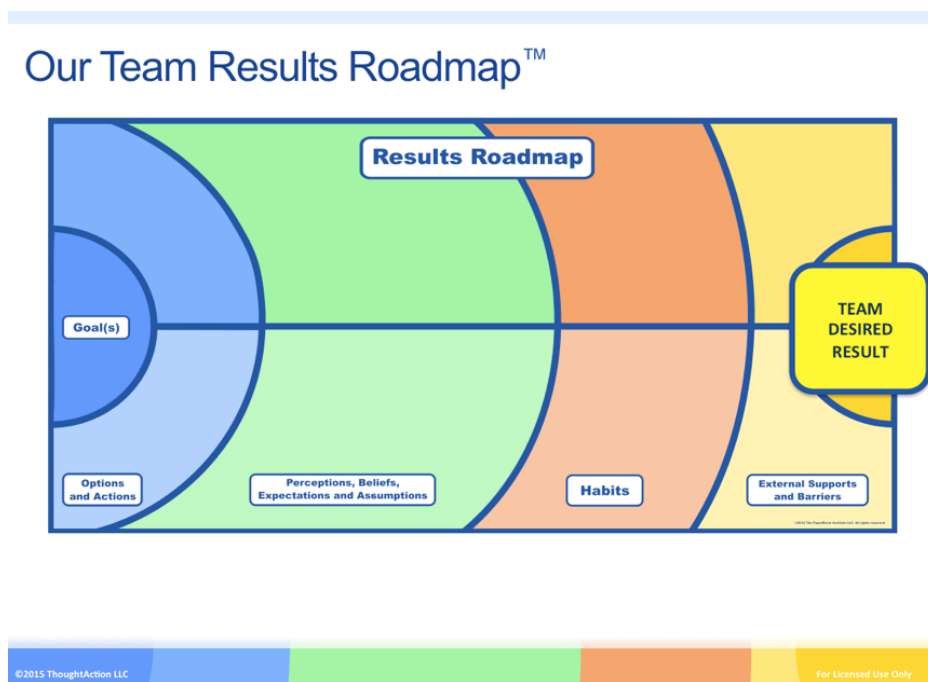


**Pre-work questions:**

What is your Desired Result for your business?

What goals/options are on your wish list in the next 12 months, specific to the Team?

**Perceptions, Beliefs, Expectations, Assumptions:**

Thoughts (thinking) that might interfere with the Team achieving the desired result are…

**Habits:**

The behaviors on the Team that interfere with achieving the desired result are…

The new habits the Team needs to put into place to achieve the desired result are…

**External Supports and Obstacles:**

The people and places the Team can go to for support are…

The external circumstances or situations that might interfere with the Team achieving the desired result are…