

# 2 Stages, 12 Steps Better Decisions Faster

## Stage 1: Strategic

### 1: Issue

**An opportunity for, or obstacle to, growth**

- Improves competitiveness.
- Needs extra effort.
- Ability to implement.
- Choose the issue of highest priority or where you will see the most impact.

### 2: Assumptions

**Reasons why the issue is important**

- Every strategic plan is built on a set of assumptions (those things you believe to be true).
- Assumptions spell out the worst-and best-case scenarios if the issue is unsolved and solved.
- Assumptions declare your reasons to finish what you start regardless of the obstacles.
- You also need to make an assumption about how the issue will impact your organization in additional revenue over time to rationalize your ROI for plan implementation (\$Difference).

### 3: Values

**Beliefs/behaviors that drive organization success**

- Specific to your issue.
- Can be relied upon to successfully implement your strategy.
- Important because you must make sure you do not attempt to do something strategically that is counter culture.

### 4: Vision

**The best imaginable outcomes for the issue**

- Establishes the frame of reference for the entire plan.
- Create AB FAB BHAGS (absolutely fabulous big hair audacious goals) with no thought as to how you will accomplish them.
- Attach metrics; quantification clarifies the interpretation of your visionary intentions

### 5: Customer Benefits

**Customer payoff from the vision**

- The customer is a vital part of your vision. you do not make money, you provide products and services; the customer supplies the money. So, in effect, the customer is the banker or venture capitalist for your vision.
- Your vision must address your customers' needs.
- If customers don't buy in to your vision based on self interests, then the project is bankrupt.
- Quantify how they will benefit.

### 6: Other Beneficiaries

**Others who will benefit from your vision**

- You will need help from others to implement your vision.
- Could include employees, vendors, alliance partners, family, etc.
- Quantify how they will benefit.

# Stage 2: Tactical

## 7: Vital Signs

**Measurements to audit, track, and adjust your plan**

- By definition, vision is currently impossible; otherwise, you'd be doing it.
- When you created your vision, you created a performance gap. The gap is the distance from current reality to the vision and is full of obstacles.
- You must identify and examine all of your obstacles so you know what is facing you and what is needed in terms of effort to overcome the obstacles.
- Phrase obstacles in "How to" (or H2) statements to make them challenges instead of problems.

## 8: Obstacles

**Obstructions to the vision**

- This step is about identifying what you will measure.
- Vital signs are key indicators.
- The measurements that matter most are those that reinforce the accomplishment of the visionary outcomes for the issue.
- Measure two each from Values, Vision, Customer Benefits, and Other Beneficiaries (steps 3, 4, 5, and 6).

## 9: Strengths, Weaknesses, and Opportunities

**What you have going for and against the issue**

- Strengths you can build on.
- Weaknesses you need to correct or finesse.
- Opportunities you can leverage.

## 10: Strategic Initiatives

**Performance gaps that need to be closed**

- Here is where you decide which performance gaps to attack with strategy.
- Select up to three gaps to close from Obstacles and Weaknesses.
- For each gap, describe strategic transition **from** current state **to** desired state (that is, from "as-is" to "want to be.")
- Replace a gap with another when you close it until all of your gaps are closed.

## 11: Actions

**Activities necessary to close the performance gaps**

- Describe all of the actions needed to accomplish your vision to go from current status (From) to desired status (To).
- Prioritize actions.

## 12: Title

**Vision in 3 to 5 words**

- Gives the project identity.
- Makes it easier to communicate about the plan.
- Is a rallying cry.

*Planning turns...*

**Vision → Reality**

**Intentions → Results**

**Purpose → Performance**

