

**ADDITIONAL INFORMATION  
FOR  
“MAKING STRATEGIC PLANNING HAPPEN”**

**INTRODUCTION**

Thank you for asking for more information to support the book “Making Strategic Planning Happen. “ I hope that you are enjoying it so far, and I would be really interested to know the kinds of results that you have achieved.

These are several different kinds of additional information available. These are:

- On my website ([www.lakegroup.com.au](http://www.lakegroup.com.au)) you will find several articles on strategic planning that you can either enjoy yourself, or send to other managers to help them understand the strategic process better - or both.
- Also on my website there are four free videos on strategic planning which run on-line. You do not have to wait for hours for a download; they will start to play immediately. If you do not have “RealPlayer” on your system (which you need to view the videos) then you can download a free copy from my site.
- If you feel like buying some other material then I have made a 40 minute video that covers the strategic retreat, which you can buy from The Lake Group through the website.
- I have written a new book that is being sold as part of the Sunday Times series of books as “The Strategic Planning Workbook”. This book includes the 40 minute video for free, and if you are not able to get to a bookstore in Europe then you can get a copy from The Lake Group – again through the website
- The rest of this document contains many of the key tables and charts that are described in “Making Strategic Planning Happen”, but are not drawn. You can copy and use them as part of your strategic planning process. Good Luck.

**THE TABLES AND CHARTS**

**You should look at these tables and charts in conjunction with your book.**

**CUSTOMER ANALYSIS**

**Customer value by total sales**

Customer name	Total value in dollars (for the past 12 months)	Likely growth over the next 12 months	Likely growth over the next 3 years
	Total:	Total:	Total:

Now, draw a line in yellow highlighter at the point where 80% of the value for that column is achieved (all the amounts above that line add up to 80% of the total). Also, draw a line in blue highlighter at the point that represents 20% of the customers on your list. These lines will probably be at different places in each column.

**Customer value by profit**

Customer name	Total value in dollars (for the past 12 months)	Likely growth over the next 12 months	Likely growth over the next 3 years
	Total:	Total:	Total:

Once again put a yellow highlight line in each column to show when 80% of the value has been achieved, and draw a blue line below the top 20%.

**Segment by dollar value**

Segment	Total value in dollars (for the past 12 months)	Likely growth over the next 12 months	Likely growth over the next 3 years
Segment A			
	Total:	Total:	Total:
Segment B			
	Total:	Total:	Total:
Segment C			
	Total:	Total:	Total:

**Segment by profit**

Segment	Total value in dollars (for the past 12 months)	Likely growth over the next 12 months	Likely growth over the next 3 years
Segment A			
	Total:	Total:	Total:
Segment B			
	Total:	Total:	Total:
Segment C			
	Total:	Total:	Total:

**Customer preferences analysis**

PRODUCT	SEGMENT/ CUSTOMERS FOR THIS PRODUCT	WHY THE CUSTOMER BUYS	ADVANTAGES FROM THE CUSTOMER'S POINT OF VIEW	LEVEL OF SATISFACTION

**POTENTIAL CUSTOMER ANALYSIS**

**Potential customers who are doing business with your competitors**

Potential customers	Value of these customers (in dollars per year)	Competitor's attraction	Our response	Likelihood of success

**Customers who are not yet operating in your market/ region**

Potential customers	Value of these customers	Action required to secure this customer	Likelihood of success

**COMPETITOR ANALYSIS**

Competitors	Products/ services	Market share	Leverage/ attractiveness	Price advantage	Financial position	Likely future

**Potential competitor analysis**

Potential competitor	Likelihood of entering the market	Likely approach to entice your customers	The degree of threat

### HALLMARKS OF SUCCESS ANALYSIS

Feature	Rank	Current performance	Improvement opportunity

### ENVIRONMENTAL ANALYSIS

Past	Present	Future

### BARRIERS TO ENTRY ANALYSIS

#### **Barriers that affect your competitors**

Barriers that protect your business	Cost to a competitor	Likelihood that a competitor will make this investment

#### **Barriers your competitors use to lock you out**

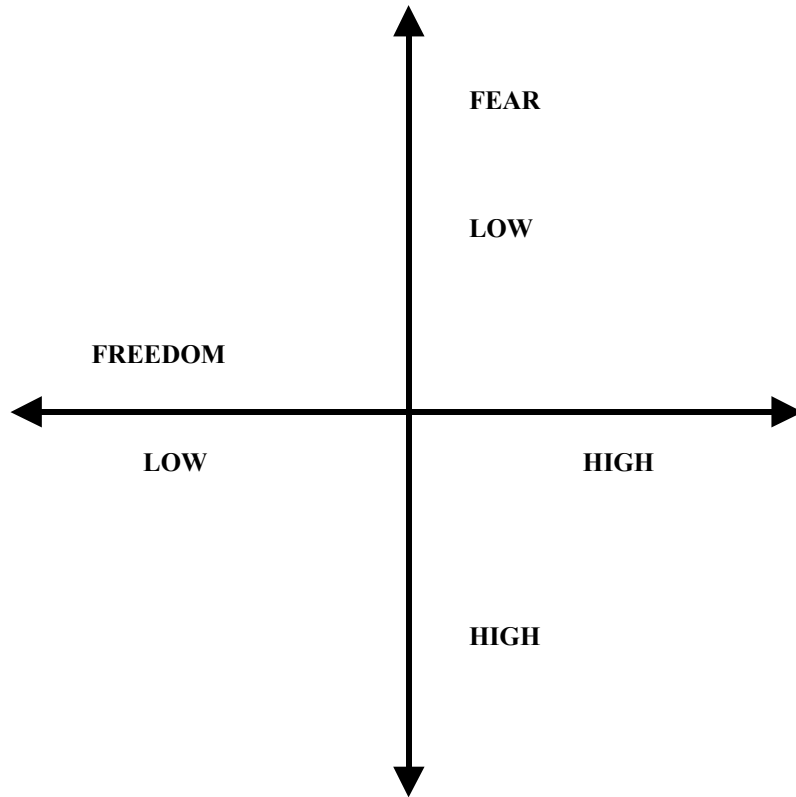
Barrier	Cost to overcome this barrier	Likelihood of success

### AVAILABILITY ANALYSIS

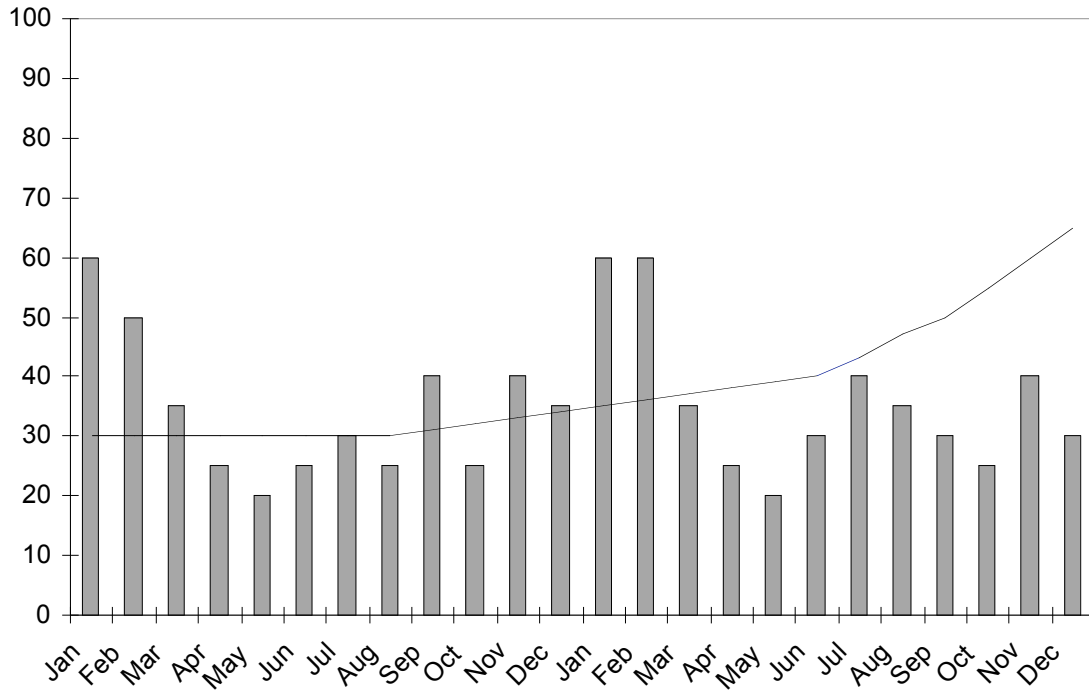
Requirements	Threats to those requirements	Likelihood of a threat becoming a reality

CULTURE ANALYSIS

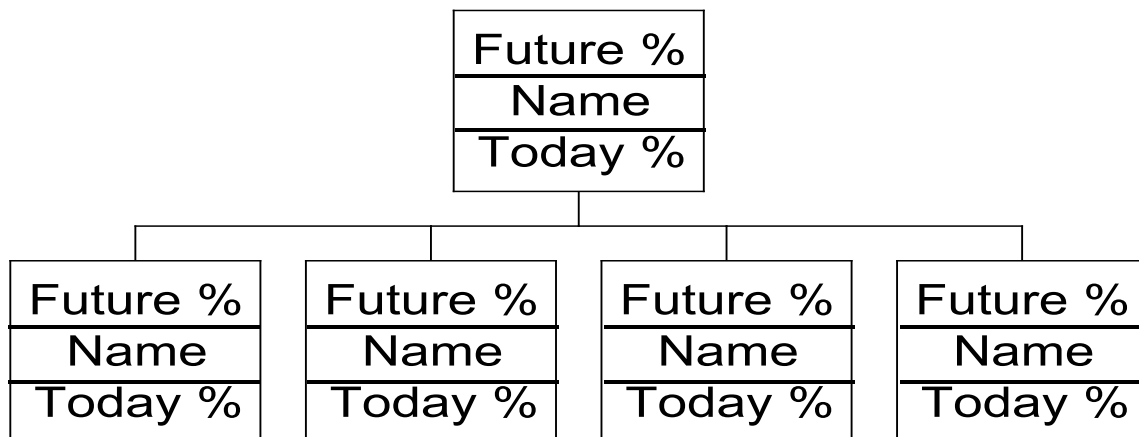
**FEAR – FREEDOM ANALYSIS SCALE**



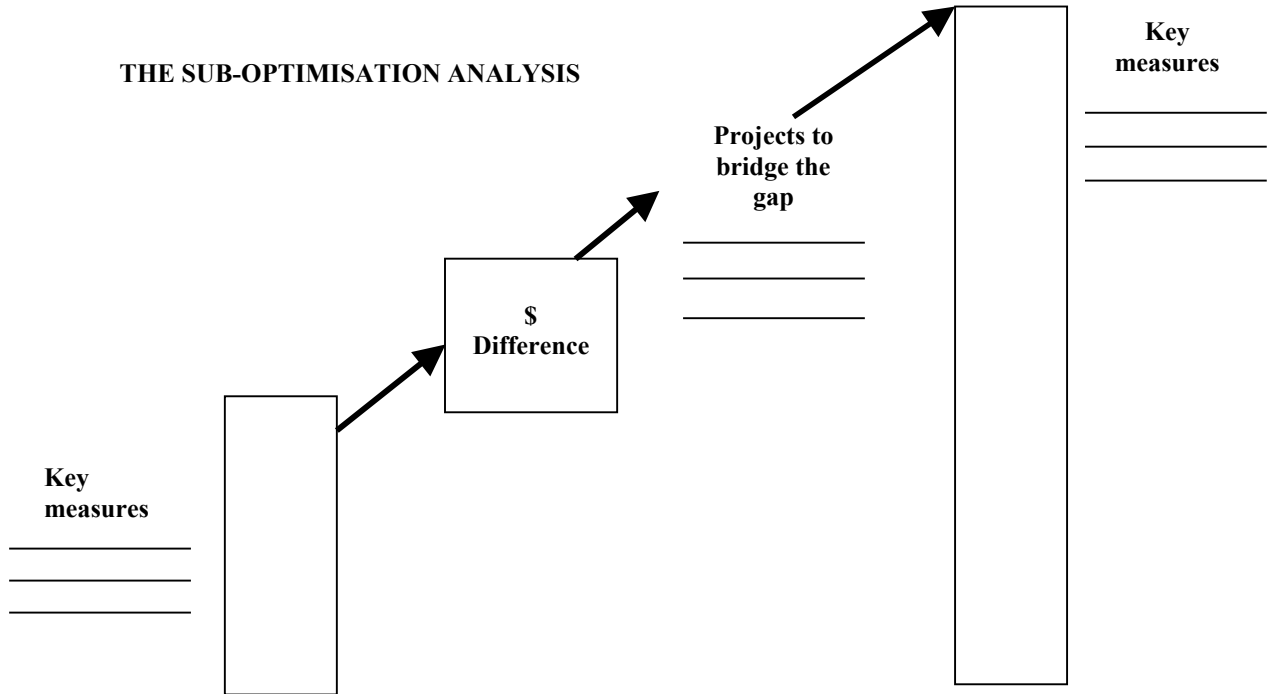
## FINANCIAL PERFORMANCE ANALYSIS



## SKILLS/ TALENT ANALYSIS



PROCESS PERFORMANCE



RISK ANALYSIS

The risk	Impact	Consequences in dollars	Likelihood

### RESOURCES VS OUTCOMES ANALYSIS

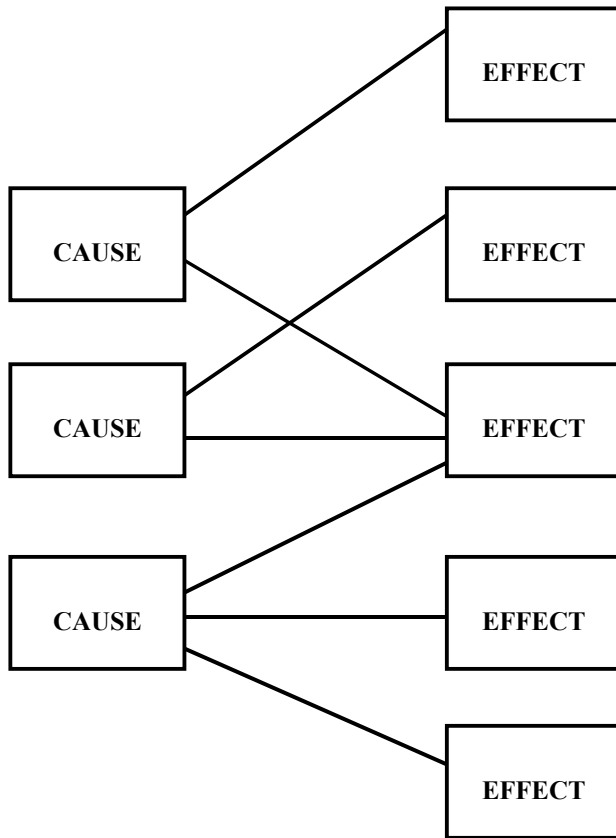
Projects/ activities/ products/ services	Costs	Outcomes

### RESOURCES vs. OUTCOMES MATRIX

		PAYOFF	
		LOW	HIGH
COST	LOW		
	HIGH		



## CAUSE AND EFFECT ANALYSIS



## RELATIVE SCALE ANALYSIS

Process	Your metrics	Internal/ external (generic) metrics

### ABSOLUTE SCALE ANALYSIS

	High score	Medium score	Low score	Implication	Action	Value
Leadership						
People						
Policy and Strategy						
Resources						
Processes						
Customers						
Impact on Society						
Business Results						