



## TACTICAL PLANNING SESSION

### AGENDA:

#### **I. What result do you want to see at the end of the planning session?**

What does a successful planning session cover what associated items of importance do you want to see covered?

*Example*

- *Company goals*
- *Growth Strategies*
- *Marketing strategies*
- *Necessary Support*

#### **II. What factors determine your company's current position within the marketplace? What makes it so good?**

What does it have to offer the marketplace? (Special services and intrinsic values)

*Example*

- *Products and Services*
- *Location*
- *Community contacts*
- *Extraordinary expertise*

#### **III. Describe the needs of the Market**

What does your market need beyond what your company offers?

*Example*

- *Make-up of market - Culture, specific niche talents, etc.*
- *Trends – both positive and negative*
- *Competition*

#### **IV. Scenario:**

It's 12/31/0X and your company has met or exceeded goal. How was it accomplished?

*Example:*

- *New markets?*
- *New mix of Products/services?*
- *Employees?*

## **V. Key Result Areas**

- Determine the 'key categories' from the ideas listed in the above exercise
  - Ex: Marketing / Sales / Operations / Training, etc.
- List the associated tasks within each category
- Assign a leader responsible for each category
  - Assign support personnel for each

## **VII. Process flow - Build the plan**

- Creation of a Gant Chart showing milestones/goals, report dates and timelines covering the year. This will be the skeleton from which your business plan will emerge.
- A clear listing highlighting areas of individual and group responsibilities will be discussed and agreed to by the entire group ensuring buy-in.
  - Roles clearly defined
  - Authority and responsibility clearly delegated
  - Report dates and system identified and agreed to.

## **VIII. Why won't it work?**

- Obstacles that can derail the plans?
- Contingency plans

## **IX. Filling the holes**

- What's missing?

## **X. Ensure all questions and concerns have been answered**

- Brief review of Section I to ensure all questions, concerns and needs have been covered to guarantee complete understanding in the plan and its execution.