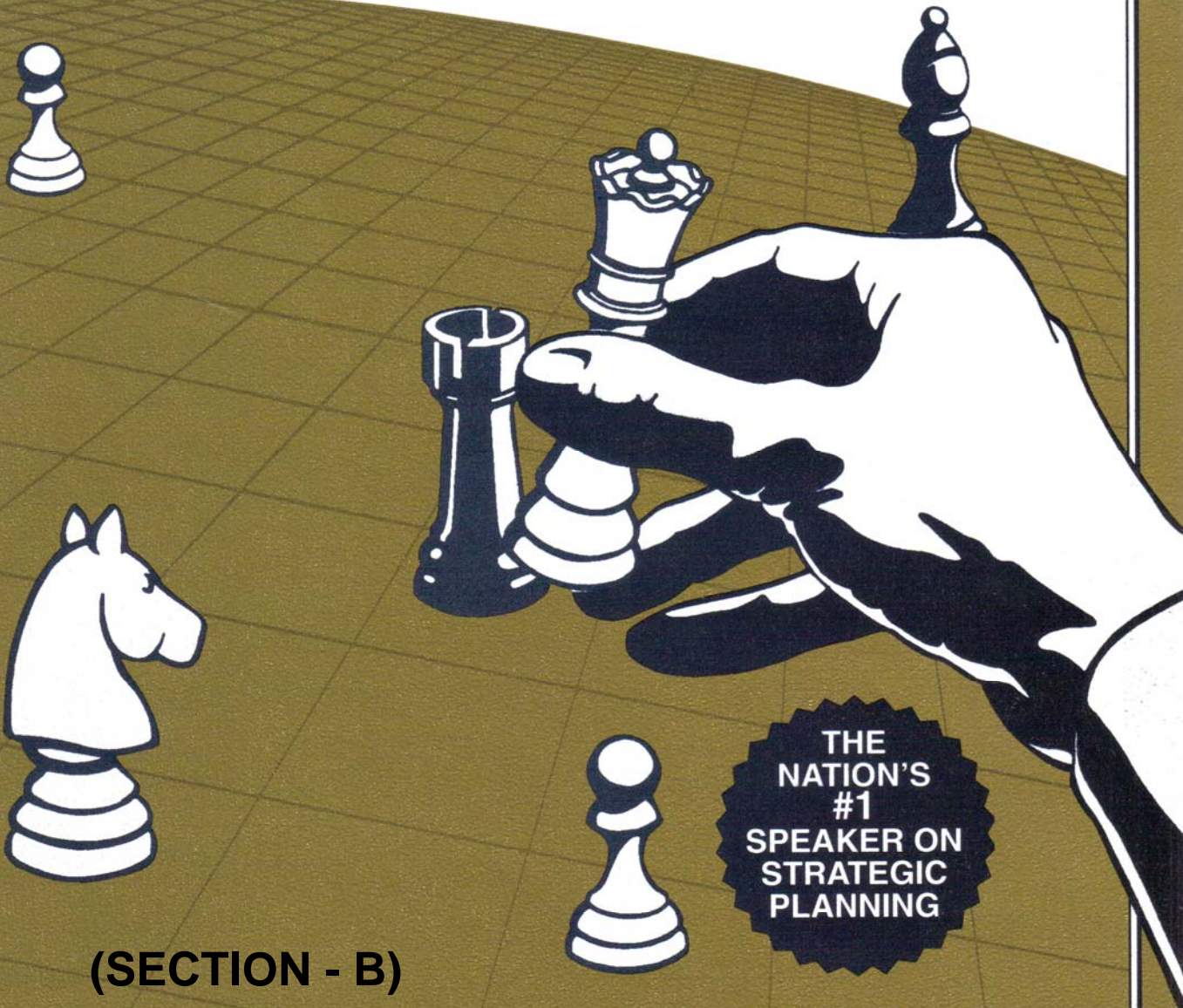


# STRATEGY

# BY DESIGN

*How To Definitively Establish In Precise Terms the Strategic Identity, Image and Reputation of Your Specific Company, Your Products and Your Services Such That In the Mind of Your Targeted Marketplace There Could Be No Acceptable Alternative Available Anywhere... Regardless of Price.*



**THE  
NATION'S  
#1  
SPEAKER ON  
STRATEGIC  
PLANNING**

**(SECTION - B)**

*Dr. Peter Johnson*  
CORPORATE STRATEGIST

# FOREWORD

## “STRATEGIC ACHIEVEMENT”



It is a well-known fact that long hours of hard work are required to reach the very top in business. *Strategic Achievers*, by and large, are driven by a passion for work that is quite as powerful as any other human drive. Their work takes precedence over hobbies, vacations, children, even spouses. Business Executives who lack this overpowering commitment, will almost certainly be eclipsed by those who do have it.

*Strategic Achievers* cheerfully admit that they are workaholics. They are often so intent on work that they look upon vacations as a nuisance. They tend to prefer long weekends rather than vacations because, after being away from the action for a few days, they begin to get jumpy.

The *Strategic Achiever* requires an extraordinary amount of energy to satisfy this passion for work. Many a talented young business executive has failed to get ahead, simply because they were not built to take the grind. Keep in mind, “Thoroughbreds are bred to race.”

To confess fatigue is often regarded by *Strategic Achievers* as an admission of weakness or lack of dedication. This can sometimes become a problem for subordinates, because others seldom work at this same level of intensity or pace. One *Strategic Achiever* admits, “You think everyone’s on the same wavelength that you are, and then you find that you are burning out your team.”

Money may draw people to business in the first place, but it is not what motivates them to reach the very top. **POWER** is. Of course they possess an above average level of intelligence, which is a prerequisite for the executive who hopes to reach the very pinnacle of business.

*Strategic Achievers* are extremely competitive and take intense pleasure in winning. People who disdain or fear competition never get very far in business, because what long term business success really boils down to is an endless series of hard fought contests. They understand that simply working hard is just not enough; but rather it is doing the right things, at the right times, and most important of all, for the right reasons. This is what truly separates the *Strategic Achievers* from their highly motivated professional counterparts.

*Strategic Achievers* are compulsively curious. This characteristic manifests itself quite early in their careers. The budding *Strategic Achiever* refuses to stay put and wanders from their office through other departments. They tend to ask questions, offering suggestions and generally make a nuisance of themselves. Even after they have moved up within the company, the *Strategic Achiever* remains obsessed with details.

The *Strategic Achiever* is a masterful opportunist, keenly alert to any chance for personal advancement. They are tougher and more aggressive than other people. They also know how to get along with and how to integrate themselves with others on their way up. Above all, they are true believers. They believe in themselves, in their jobs, in their companies, in their products and services, and they believe in the free enterprise system. And of course, why shouldn’t they? It certainly has worked for them.

# "MY ONE-SHEET STRATEGIC PLAN"

INITIAL DRAFT

(BLUE-SHEET)



(3 - MONTHS)

**A. Mission / Vision Statement:**

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**B. Top 5 Targeted Performance Goals:**

Last Year

This Year

Next Year

1.	<hr/>	<hr/>	<hr/>
2.	<hr/>	<hr/>	<hr/>
3.	<hr/>	<hr/>	<hr/>
4.	<hr/>	<hr/>	<hr/>
5.	<hr/>	<hr/>	<hr/>

**C. Top 5 Major Objectives / Targeted Accomplishments:**

Lead

Target Date

1.	<hr/>	<hr/>
2.	<hr/>	<hr/>
3.	<hr/>	<hr/>
4.	<hr/>	<hr/>
5.	<hr/>	<hr/>

**D. Key Strategies:**

Lead

Role Model

1.	<hr/>	<hr/>
2.	<hr/>	<hr/>
3.	<hr/>	<hr/>
4.	<hr/>	<hr/>

**E. Top 3 Current Critical Issues / Challenges:**

POC

Critical Date

1.	<hr/>	<hr/>
2.	<hr/>	<hr/>
3.	<hr/>	<hr/>

**F. Immediate Strategic Priorities / Follow-Up TIP Actions:**

Follow-Up Action Items	Lead	Date	Status	Next Action
1. <hr/>	<hr/>	<hr/>	<hr/>	<hr/>
2. <hr/>	<hr/>	<hr/>	<hr/>	<hr/>
3. <hr/>	<hr/>	<hr/>	<hr/>	<hr/>
4. <hr/>	<hr/>	<hr/>	<hr/>	<hr/>
5. <hr/>	<hr/>	<hr/>	<hr/>	<hr/>

# "MY ONE-SHEET STRATEGIC PLAN-B"



**INITIAL DRAFT**

(BLUE-SHEET)

**G. Biggest Current Customers:**    Our POC    Key Cont.    2005\$    2006\$    #1 Compt.

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

**H. Biggest New Sales Opportunities:**    POC    Key Cont.    Potl.\$    Key Issue    #1 Competitor

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**I. Top Direct Competitors:**    Sales    Strengths    Our Advantage    Key Professionals

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**J. Our Strategic Plan Wish List / Critical Elements for Improving Success:**

1. \_\_\_\_\_ 5. \_\_\_\_\_

2. \_\_\_\_\_ 6. \_\_\_\_\_

3. \_\_\_\_\_ 7. \_\_\_\_\_

4. \_\_\_\_\_ 8. \_\_\_\_\_

**K. Performance-On-Goal / Progress-On-Plan:**

Goal / Objective	Lead	Date	Status	Next Action
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____

**L. Quarterly Performance Review Schedule:**

Review Dates	Location / Time	Meeting Lead
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____

**M. Executive Planning Team:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

# “STRATEGIC GOALS and OBJECTIVES”



**UNDER DEVELOPMENT**

## STEP - 1 / FOCUS PHASE

**A. STRATEGIC MISSION / VISION / CORE VALUES:**

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**B. STRATEGIC MEASUREMENTS / PERFORMANCE INDICATORS:**

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**C. TARGETED PERFORMANCE GOALS / PROJECTIONS:**

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**D. CURRENT CRITICAL ISSUES, PROBLEMS, CHALLENGES:**

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**E. MAJOR STRATEGIES / STRATEGIC INITIATIVES:**

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**F. MAJOR STRATEGIC MILESTONES:**

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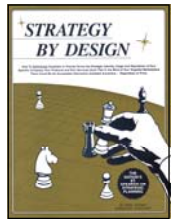


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**G. IMMEDIATE STRATEGIC PRIORITIES:**

<u>Action Items</u>	<u>Lead</u>	<u>Date</u>	<u>Status</u>	<u>Next Action</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
Etc. _____	_____	_____	_____	_____

# “TARGET MARKET RESEARCH / ANALYSIS”



**UNDER DEVELOPMENT**

## STEP - 2 / ANALYSIS PHASE

### A. STRATEGIC OBJECTIVES:

1. To methodically define, analyze, prioritize and continually reevaluate the TOP-10 most strategically profitable business (sales) opportunities based upon; (a) probability to capture, (b) how soon to capture and (c) the increase in sales volume it represents.
2. To methodically define analyze, prioritize and continually reevaluate all of the essential “Vital Data Units” critical to the systematic forward progress in capturing each target account’s sales goals.
3. To methodically define, analyze, prioritize and continually fine tune the detailed account strategies and actions necessary in the expeditious capturing of each targeted sales goals.

### B. TARGET MARKET SEGMENTATION:

<u>BIGGEST CURRENT CUSTOMERS:</u>	<u>MOST “MAKEABLE” OPPORTUNITIES:</u>
1. _____ 2. _____ 3. _____ Etc. _____	1. _____ 2. _____ 3. _____
<u>HIGHEST INDUSTRY VOLUME:</u>	<u>MOST STRATEGICALLY INFLUENTIAL:</u>
1. _____ 2. _____ 3. _____ Etc. _____	1. _____ 2. _____ 3. _____ Etc. _____

### C. CUSTOMER KEY CONTACT ANALYSIS:

<u>Contact Level</u>	<u>Total</u>	<u>Key Contact Names</u>
1. Executive Management	_____	_____
2. Key Decision-Makers	_____	_____
3. Actual End Users	_____	_____
4. Key Influences	_____	_____
5. Critical Supporters	_____	_____

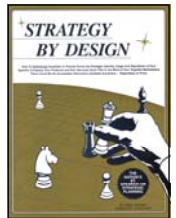
### D. ACCOUNT PENETRATION PERFORMANCE ANALYSIS:

- |  |   |
|--|---|
| 1. How big is the entire pie? _____            | 5. What are they doing right? _____             |
| 2. How big is our slice of the pie? _____      | 6. What might they be doing wrong? _____        |
| 3. Who has the biggest slice of the pie? _____ | 7. How do we currently measure up? _____        |
| 4. How big is their slice of the pie? _____    | 8. What specifically must we do to be #1? _____ |

### E. ANNUAL CUSTOMER SATISFACTION SURVEY:

<u>Sample Criteria</u>	<u>Priority</u>	<u>Rating</u>	<u>Suggestions for Improvement</u>
1. Personal Service	_____	_____	_____
2. Easy to Work With	_____	_____	_____
3. Competitive Pricing	_____	_____	_____
4. Communications Integrity	_____	_____	_____
5. Consistent Quality	_____	_____	_____
6. Timely Delivery	_____	_____	_____
7. Follow-up Support	_____	_____	_____
8. Other: _____	_____	_____	_____

# “COMPARATIVE COMPETITIVE ANALYSIS”



**UNDER  
DEVELOPMENT**

## STEP - 3 / ANALYSIS PHASE

### **A. COMPETITIVE INTELLIGENCE SYSTEM SETUP:**

1. Designate a Competitive Intelligence Coordinator, 2. Setup a Competitive Research and Analysis File Cabinet and Log-Out System, 3. Define and Setup a Competitive Intelligence Lookout Network, 4. Define and Distribute a Competitive Analysis “Get List” to All Network Personnel, 5. Distribute a Monthly Competitive Hot List Update Report to All “Need-To-Know” Personnel.

### **B. COMPETITIVE RESEARCH and ANALYSIS GROUPINGS:**

<b><u>DIRECT LOCAL COMPETITORS:</u></b>	<b><u>TOP INDUSTRY PERFORMERS:</u></b>
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
Etc. _____	Etc. _____
<b><u>POTENTIAL “UP and COMERS”:</u></b>	<b><u>NON-INDUSTRY ROLE MODELS:</u></b>
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____
Etc. _____	Etc. _____

### **C. COMPETITIVE INTELLIGENCE PROFILE: (Key Vital Data Units)**

1. Length of Experience, 2. Unique Positioning Factor, 3. Product / Service Specialization, 4. Key Vertical Markets, 5. Comparative Pricing Structure, 6. Comparative Packaging Design, 7. Comparative Marketing Strategy, 8. Estimated Volume / Revenues, 9. Key Leaders / Performers, 10. Key Factors of Success.

### **D. COMPETITIVE ANALYSIS CHARTS: (Visual Display Tracking)**

1. Group by Category and Priority, 2. List All Comparative Data, 3. Corporate Key Personnel, 4. Detailed Product Photographs, 5. Competitive Intelligence Dossiers, 6. Review and Update Quarterly.

### **E. COMPETITIVE INTELLIGENCE DOSSIERS: (Detailed File Folders)**

1. Detailed Background Profile, 2. Promotional Brochures, 3. Annual Reports, 4. 10K Reports, 5. Publication Advertisements, 6. Media Advertisements, 7. Sample Price Lists, 8. Product Catalogs, 9. Actual Product Samples, 10. Sample Client Proposals, 11. Terms and Conditions.



# “RECOMMENDED ACTION PLAN”



**UNDER  
DEVELOPMENT**

## STEP - 5 / PREPARATION PHASE (GREEN-SHEET)

Discussion Topic: \_\_\_\_\_ Topic #: \_\_\_\_\_

Team Spokesperson: \_\_\_\_\_ Team Scribe: \_\_\_\_\_

Team Members: \_\_\_\_\_

**A. KEY / CRITICAL ISSUES:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

etc. \_\_\_\_\_

**B. THE “IDEAL” FIX:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

etc. \_\_\_\_\_

**C. A “REALISTIC” PROPOSED GAME PLAN:**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

etc. \_\_\_\_\_

**D. “TIP” FOLLOW-UP ACTION ITEMS:**

<u>“TIP” Action Item</u>	<u>Lead</u>	<u>Date</u>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
Etc. _____	_____	_____

# “STRATEGIC IMPLEMENTATION PLAN”



**UNDER  
DEVELOPMENT**

## STEP - 6 / INTENSITY PHASE

<u>Critical Elements</u>	<u>Process Driver</u>	<u>Date</u>	<u>Status</u>	<u>Next Action</u>
<b>A. <u>PRODUCT PERFORMANCE / VALUE:</u></b>		Coordinator: _____		
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____
<b>B. <u>CUSTOMER SUPPORT SERVICE:</u></b>		Coordinator: _____		
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____
<b>C. <u>MARKETING and SALES:</u></b>		Coordinator: _____		
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____
<b>D. <u>OPERATIONS / ADMINISTRATION:</u></b>		Coordinator: _____		
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____