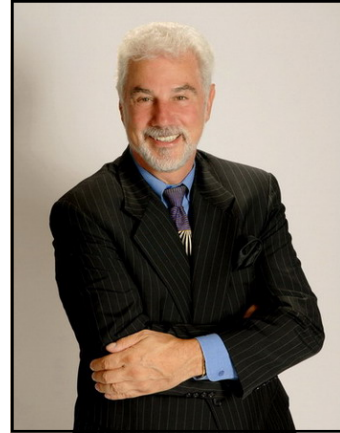


“TURNING CHANGE INTO A COMPETITIVE ADVANTAGE”



DESIGNED SPECIFICALLY FOR:

Dr. Peter Johnson
MARKETING STRATEGIST



Dr. Peter Johnson
MARKETING STRATEGIST

FOREWORD

It's a well-established fact that those organizations which **Think Strategically, Plan Competitively and Implement Intensely** will most certainly eclipse the rest of their field. It's for this very reason that so many of the leading high-growth organizations throughout the world today employ some form of proactive strategy and planning process to help map out the detailed game plans for creating their future. However, when it comes to strategy and planning, all too often some of the most brilliant ideas, dedicated intentions and methodically devised plans end up falling short of their expectations. This is due primarily to the inherent realities of today's constantly changing business environment. It would certainly appear that very few things ever remains consistent, or at least not for very long.

Fortunately today, with the added advantages of recently developed advancements in technology, new age business systems and extensively adaptable strategy and planning models, companies are finally able to design, write, implement and control the tempo of their entire Strategic Business Planning process. Even more impressive are the capabilities these new models provide for controlling the overall "Performance-On-Goal" results while still working well within the parameters of critical budget and resource constraints.

A truly unique innovative approach, the Adaptive Strategy Planning Model was one of the first to incorporate a very fluid, menu-driven approach to the entire process. As a result, its unparalleled simplicity enables organizations and their management teams to select and adapt each key component of the process so it best fits the ever-changing parameters and needs of their individual changing environments. **Obviously... RESULTS are the Name of the Game.**

“PROGRAM OVERVIEW”

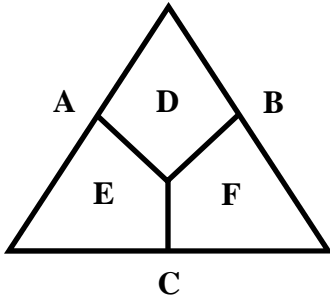
THE ULTIMATE OBJECTIVE

“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 market-place there could be no acceptable alternative available anywhere... regardless of price.”

PRIME DIRECTIVE



CRITICAL KEYS GOVERNING STRATEGIC SUCCESS



- A. _____ D. _____
B. _____ E. _____
C. _____ F. _____

COMPARATIVE ANALYSIS

- 1a. _____ b. _____
2a. _____ b. _____
3a. _____ b. _____
4a. _____ b. _____
5a. _____ b. _____

PRACTICAL STRATEGIES AND GROUNDRULES

SUCCESS BY DESIGN

- Step #1: _____
Step #2: _____
Step #3: _____
Step #4: _____
Step #5: _____
Step #6: _____

“CURRENT CRITICAL STRATEGIC ISSUES”

OBJECTIVES

Phase I. Identify and list every (all) current critical issues, problems and challenges which you feel might impeded the accomplishment of your overall goals and objectives. Please outline your issues using 2-3 word bullet points to make them easier to compile.

Phase II. Select what you feel are the Top 5 highest priority issues. (Circle and Number)

Phase III. Assign target dates and teams to outline proposed action plans to address designated issues.

<u>Negative Strategic Issues / Challenges</u>	<u>Priority</u>	<u>Date</u>	<u>Team</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____
9. _____	_____	_____	_____
10. _____	_____	_____	_____
11. _____	_____	_____	_____
12. _____	_____	_____	_____
13. _____	_____	_____	_____
14. _____	_____	_____	_____
15. _____	_____	_____	_____
16. _____	_____	_____	_____
17. _____	_____	_____	_____
18. _____	_____	_____	_____
19. _____	_____	_____	_____
20. _____	_____	_____	_____

“STRATEGIC FOLLOW-UP ACTION PLAN”

Outline what you consider to be the Top-10 Follow-Up Action Priorities based upon the cumulative ideas, input and discussions which have taken place during the course of your conference.

TOP-10 STRATEGIC PRIORITIES

<u>Follow-Up Action Issues / Items</u>	<u>Priority</u>	<u>Date</u>	<u>Status</u>	<u>Briefing / Date</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____
7. _____	_____	_____	_____	_____
8. _____	_____	_____	_____	_____
9. _____	_____	_____	_____	_____
10. _____	_____	_____	_____	_____

PERSONAL ACTION PLAN

<u>Follow-Up Action Issues / Items</u>	<u>Priority</u>	<u>Date</u>	<u>Status</u>	<u>Briefing / Date</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____

“THE #1 KEY IDEA”

The “SINGLE BEST IDEA” I learned today that will make me even more effective:

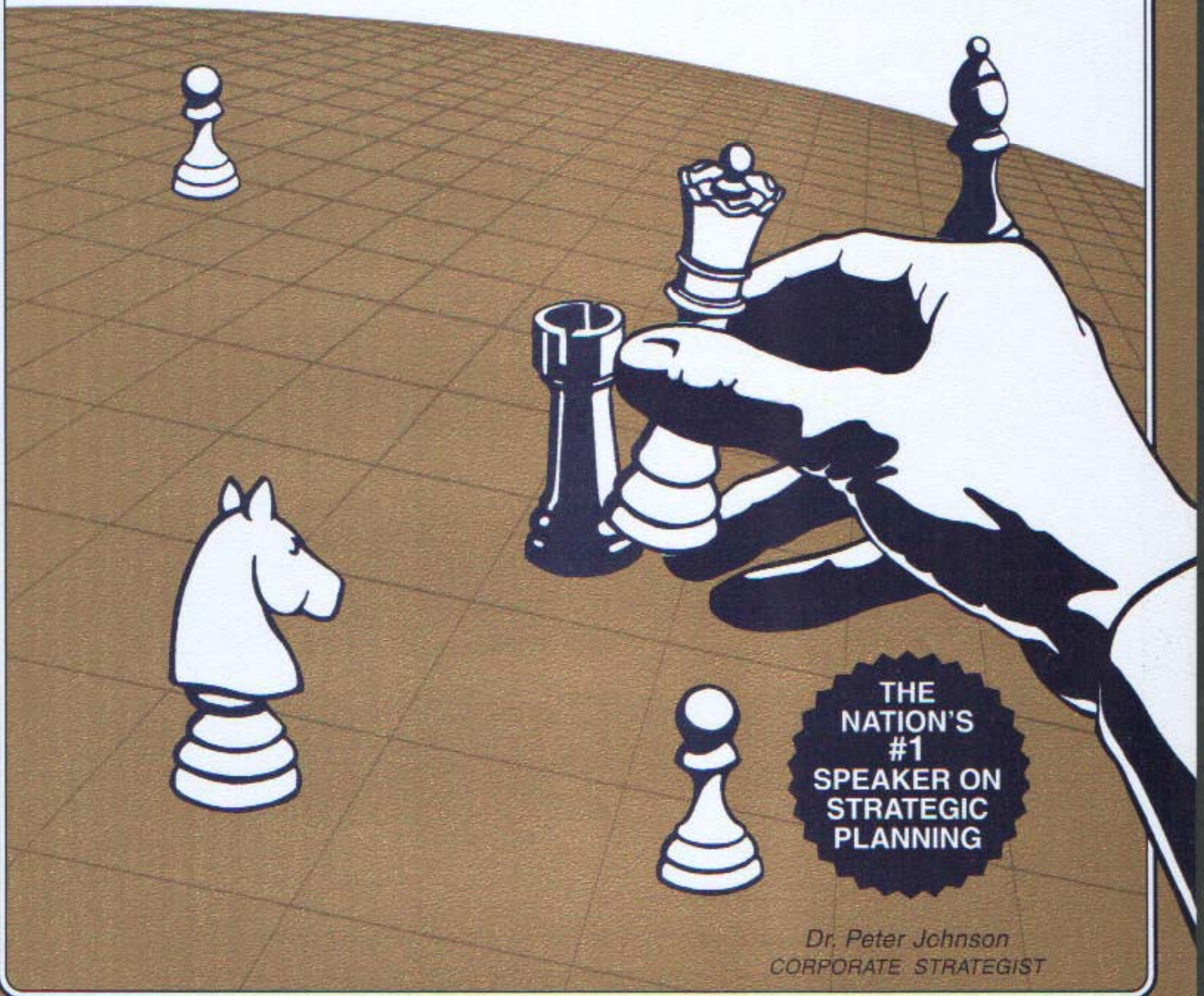


STRATEGY

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.



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.

“STRATEGIC GOALS and OBJECTIVES”

PAGE-1 / FOCUS PHASE

A. STRATEGIC VISION / MISSION / MARKET POSITION:

B. STRATEGIC MEASUREMENTS / CORE VALUES / PERFORMANCE INDICATORS:

C. TARGETED PERFORMANCE GOALS / PERFORMANCE TREND ANALYSIS:

D. CURRENT CRITICAL STRATEGIC CHALLENGES / ISSUES:

E. MAJOR STRATEGIES / STRATEGIC INITIATIVES:

F. MAJOR STRATEGIC MILESTONES:

G. IMMEDIATE STRATEGIC PRIORITIES:

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

“TARGET MARKET RESEARCH / ANALYSIS”

PAGE-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. _____ Etc. _____
<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? _____
2. How big is our slice of the pie? _____
3. Who has the biggest slice of the pie? _____
4. How big is their slice of the pie? _____ | 5. What are they doing right? _____
6. What might they be doing wrong? _____
7. How do we currently measure up? _____
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”

PAGE-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:

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

“STRATEGIC IMPLEMENTATION PLAN”

PAGE-5 / INTENSITY PHASE

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

“STRATEGIC ACTION PROGRAMS”

PAGE-6 / INTENSITY PHASE

Program: _____ Date: _____

Department: _____ Process Driver: _____

Launch Date: _____ Approved By / Date: _____

A. PROGRAM OVERVIEW / DESCRIPTION:

B. DETAILED STRATEGIC OBJECTIVES:

1. _____
2. _____
3. _____
4. _____

C. KEY STRATEGIC PERFORMANCE INDICATORS:

1. _____
2. _____
3. _____
4. _____

D. CRITICAL TARGET DATES and TIME FRAMES:

1. _____
2. _____
3. _____
4. _____

E. MULTI-PHASED PROGRAM ACTION PLAN:

PHASE I: _____

1. _____
2. _____
3. _____
- Etc. _____

PHASE II: _____

1. _____
2. _____
3. _____
- Etc. _____

“SYMPTOMS OF DANGER”

In spite of our conscientious efforts to work smart and get ahead, there are many factors which can inhibit our overall success. We do not have to subscribe to all of them. Sometimes, only a few in combination may result in our ultimate demise. As you review this list, keep a conscious lookout. Should any of these symptoms become evident, adjust your STRATEGY and initiate immediate corrective action.

Instructions: Evaluate and Rate yourself on each issue. Rating Scale is 8 = major significant negative impact, 1 = negligible significant negative impact. Then, total your score in each category. Please keep in mind... Lower Scores are best, Higher Scores indicate greater danger.

WHY BUSINESS PLANS FAIL

- | | |
|--------------------------|---|
| <input type="checkbox"/> | 1. SHIFTS OR CHANGES IN THE MARKETPLACE |
| <input type="checkbox"/> | 2. INADEQUATE CONTROL SYSTEMS |
| <input type="checkbox"/> | 3. CHANGES IN TECHNOLOGY |
| <input type="checkbox"/> | 4. DRAMATIC CHANGE IN A DISTRIBUTION SYSTEM |
| <input type="checkbox"/> | 5. ABRUPT LOCATION DISADVANTAGE |
| <input type="checkbox"/> | 6. OVER DEPENDENCE ON A SINGLE CUSTOMER |
| <input type="checkbox"/> | 7. GROWTH OF BUSINESS BEYOND SKILLS OF MANAGEMENT |
| <input type="checkbox"/> | 8. MANAGEMENT SHORT OF COURAGE |
| <input type="checkbox"/> | 9. INTERNAL CONFLICTS |
| <input type="checkbox"/> | 10. A GROUP EXERTS SELFISH INFLUENCE |
| <input type="checkbox"/> | 11. LIMITED FINANCIAL RESOURCES |
| <input type="checkbox"/> | 12. GROWTH BEYOND WORKING CAPITAL |
| <input type="checkbox"/> | 13. AN INCREASE IN THE COST OF DEBT |
| <input type="checkbox"/> | TOTAL RATING |

WHY MARKETING / SALES PLANS FAIL

FAILURE TO...

- | | |
|--------------------------|--|
| <input type="checkbox"/> | 1. ACCURATELY DEFINE HIGH PROFIT VERTICAL MARKETS |
| <input type="checkbox"/> | 2. REALISTICALLY ANALYZE DOWNSIDE RISKS |
| <input type="checkbox"/> | 3. RESEARCH & ANALYZE MARKET'S DECISION BEHAVIOR |
| <input type="checkbox"/> | 4. ESTABLISH A UNIQUE AND VITAL TARGET MARKET IDENTITY |
| <input type="checkbox"/> | 5. DEFINE EVERY CRITICAL ELEMENT IMPACTING MARKETING CAMPAIGNS |
| <input type="checkbox"/> | 6. GAIN TOTAL COMMITMENT & SUPPORT OF SENIOR MANAGEMENT |
| <input type="checkbox"/> | 7. GAIN COOPERATION & SUPPORT OF KEY DEPARTMENTS INVOLVED |
| <input type="checkbox"/> | 8. PACKAGE & PRICE PRODUCTS / SERVICES ACCURATELY |
| <input type="checkbox"/> | 9. ESTABLISH EFFECTIVE CHANNELS OF DISTRIBUTION |
| <input type="checkbox"/> | 10. IDENTIFY OR COMMUNICATE EFFECTIVELY WITH TARGET MARKETS |
| <input type="checkbox"/> | 11. DEVELOP BROAD MARKET VISIBILITY & EXPOSURE |
| <input type="checkbox"/> | 12. DEVELOP OR MAINTAIN SIGNIFICANT PENETRATION / MOMENTUM |
| <input type="checkbox"/> | 13. ANTICIPATE OR COUNTER THE RETALIATION BY MARKET LEADERS |
| <input type="checkbox"/> | TOTAL RATING |

DESTINY

*Keep your **THOUGHTS** Positive...
Because your **Thoughts** become your **WORDS**.*

*Keep your **WORDS** Positive...
Because your **Words** become your **ACTIONS**.*

*Keep your **ACTIONS** Positive...
Because your **Actions** become your **HABITS**.*

*Keep your **HABITS** Positive...
Because your **Habits** become your **VALUES**.*

*Keep your **VALUES** Positive...
Because your **Values** become your **DESTINY**.*

“PROFESSIONAL SKILL EVALUATION”

NAME: _____ DATE: _____

CURRENT POSTN: _____ CAREER GOAL: _____

- STEP #1:** Circle the Number of Your Top 10 Most Critical Skills Needed to Achieve Career Goal.
STEP #2: Rate Your Current Performance Level of the Top 10 (10 highest - 1 lowest) in “Rating A”.
STEP #3: Total Your Score at Bottom (Grand Total).
STEP #4: Get a Second Opinion Rating of Top 10 (“Rating B”), then total at bottom.
STEP #5: Select Top 3 by Priority for Improvement.
STEP #6: Define Immediate Strategic Actions for Improvement.

<u>SKILL</u>	<u>RATING</u>		<u>SKILL</u>	<u>RATING</u>	
	<u>A</u>	<u>B</u>		<u>A</u>	<u>B</u>
1. Defining Goals and Objectives			17. Awareness of Detail		
2. Innovative Thinking			18. Empathy and Understanding		
3. Decisiveness			19. Cooperative Personality		
4. Developing Long Range Strategies			20. Ability to Accept Criticism		
5. Developing Short Term Strategies			21. Articulate Oral Comm.		
6. Analytical Ability			22. Articulate Written Comm.		
7. Defining Problems and Issues			23. The Art of Questioning		
8. Setting and Following Priorities			24. Patience and Tolerance		
9. Ability to Concentrate			25. Responsive Feedback		
10. Organizational Mindset			26. Conflict and Negotiation Skills		
11. Self-Motivated			27. Persuasive Group Comm.		
12. Delegation-Responsibility/Authority			28. Telephone Effectiveness		
13. Initiative/Risk-Taking			29. Disassociation With Work		
14. Time Management			30. Balance of Life		
15. Handling Stress and Pressure			31. Continuous Personal Development.		
16. Professional Image and Attitude			32. Other: _____		

GRAND TOTAL: ___ ___

<u>TOP-3 PRIORITIES</u>	<u>IMMEDIATE STRATEGIC ACTION</u>
#1: _____	_____
#2: _____	_____
#3: _____	_____

“STRATEGIC JOB ASSESSMENT”

A Systematic Annual Reassessment of Strategic Progress and Priorities.

A. Define the Scope and Parameters of Your Job Description and Key Areas of Responsibility:

B. Brief Chronological Job (Career) Background History:

C. Define and Clarify Your Specific Job Performance Measurement:

1. _____	6. _____
2. _____	7. _____
3. _____	8. _____
4. _____	9. _____
5. _____	10. _____

D. Past Twelve Months Achievements and Successes:

E. Five Ideas or Suggestions You Could Do to be More Effective (Productive) at Your Job:

1. _____
2. _____
3. _____
4. _____
5. _____

F. Current or Pending Problems or Challenges:

The COSTS of An INACCURATE STRATEGY

- #1: Direct project-related expenses.**
- #2: Man-hours of time and effort invested by all parties involved.**
- #3: Frustration for lack of “Return-On-Investment”.**
- #4: Loss of chronological time remaining for achieving designated goals and objectives.**
- #5: Confidence in judgment and predictability by colleagues and management.**
- #6: Personal confidence in the ability to predict as well as achieve objectives.**

“STRATEGIC BUSINESS ANALYSIS”

Objective: To definitively evaluate the optimum targeted Business Mix for achieving Your Strategic Goals and Objectives.

YEAR:	<u>2005</u>	<u>2004</u>	<u>2003</u>	<u>2002</u>	<u>2001</u>
	<u>Income</u>	<u>Income</u>	<u>Income</u>	<u>Income</u>	<u>Income</u>
	<u>Qty.</u>	<u>Qty.</u>	<u>Qty.</u>	<u>Qty.</u>	<u>Qty.</u>
* ANNUAL TOTALS -					
A. PRODUCT ANALYSIS:					
A. _____ -					
B. _____ -					
C. _____ -					
D. _____ -					
E. _____ -					
F. _____ -					
G. _____ -					
H. _____ -					
B. CUSTOMER ANALYSIS:					
A. _____ -					
B. _____ -					
C. _____ -					
D. _____ -					
E. _____ -					
F. _____ -					
G. _____ -					
H. _____ -					
C. CONTACT ANALYSIS:					
Repeat Customers -					
Referrals -					
Telemarketing -					
Direct Sales -					
Networking Leads -					
Website Leads -					
Other- _____ -					