

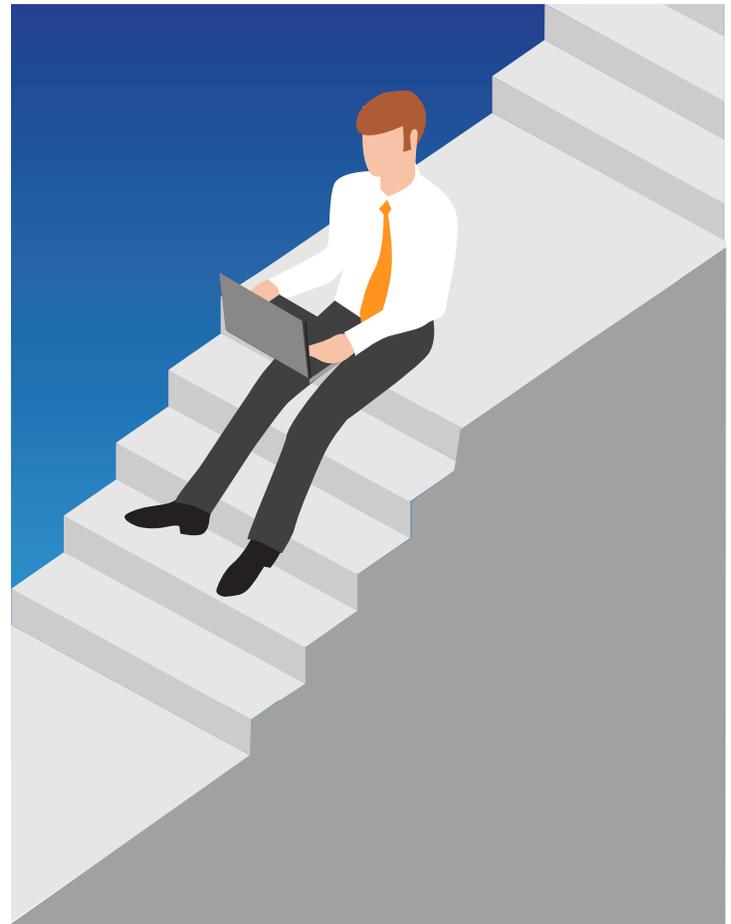
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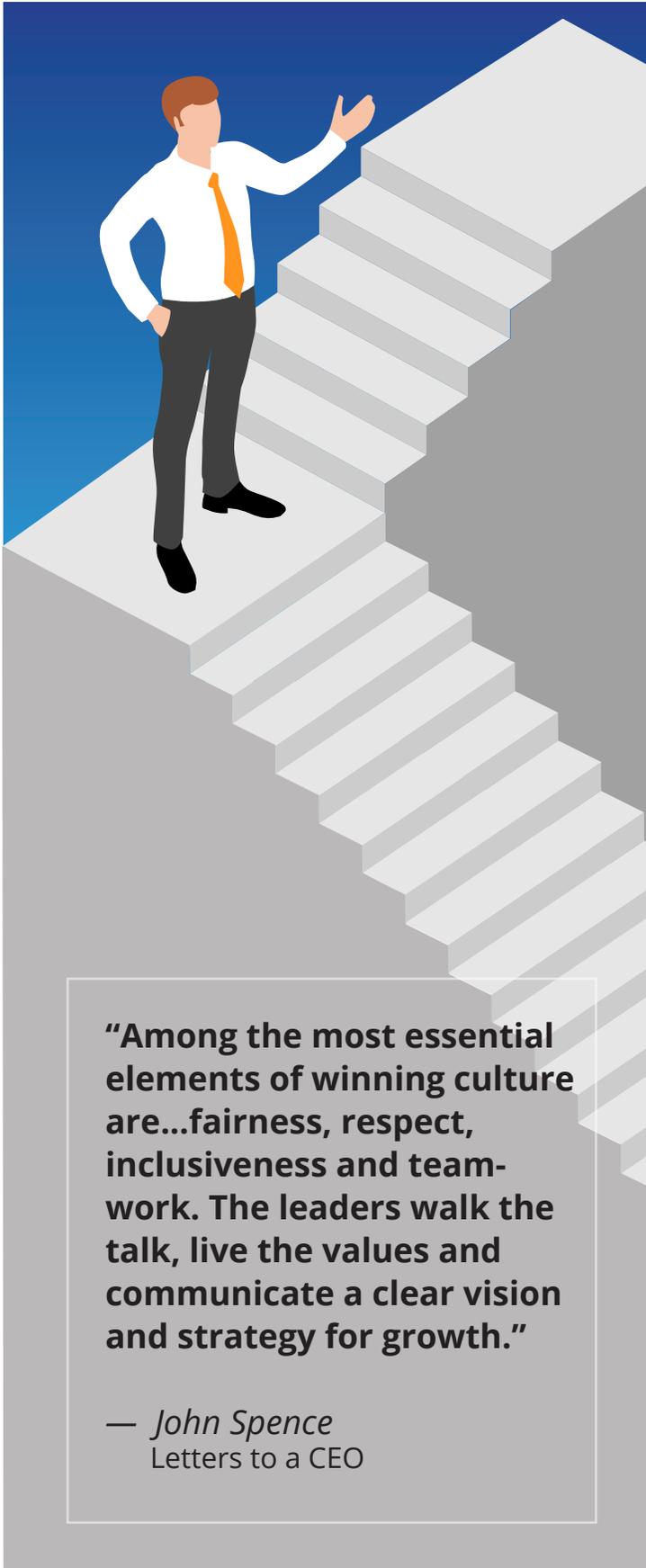
2021 Strategic Planning Guide

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STRATEGIC PLANNING is a foundational component of successful companies. When a company or organization properly implements these, they are on the path to amazing success.



“Among the most essential elements of winning culture are...fairness, respect, inclusiveness and teamwork. The leaders walk the talk, live the values and communicate a clear vision and strategy for growth.”

— *John Spence*
Letters to a CEO

INTRODUCTION

When your employees know what’s going on, exactly what the objective is, and how their specific roles contribute to meeting that objective—they take ownership and are engaged.

That’s strategic execution at its best, and, as Spence says, making it happen depends on communicating a clear vision and strategy for growth.

Articulating a strategy can be extremely challenging. That’s why we offer **Strategic Planning software** to help you get it done right. Your completed plan has 15 sections, and you need them all.

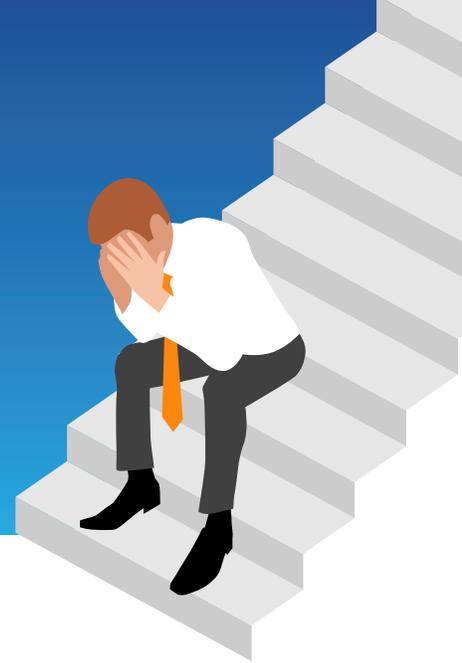
This ***Strategic Planning Guide*** introduces three of the 15:

- **Core Purpose**
- **Strategic Positioning**
- **Core Activities**

In our experience, executives often have trouble with these three—which focus on understanding what you need to do to align your workforce to execute your strategy.

The Problem

No Written Plan + Disengagement



Most companies don't have a detailed well-written Strategic Plan. And, of those that do, the actual plan rarely filters down to all levels of the organization. So, the front-line employees working in the trenches (who are expected to accomplish the plan) don't fully understand the big picture. **The result is disengagement.**

THE FACTS regarding Strategic Plans:

73% of employees *have no access* to the strategic plan.¹

95% of employees *do not know* company's strategy.²

85% of employees *do not know* company's priorities.³

94% of employees *do not know* their own priorities.⁴

70% of employees *are not* actively engaged.⁵

1 Renaissance Solutions Survey; 2 Kaplan and Norton, Harvard Business School Press, The Strategy-Focused Organization; 3 Strategy & Leadership Journal; 4 Covey and Whitman, Predictable Results in Unpredictable Times; 5 Gallup 2013 Employee Engagement Poll

Is it any wonder that 90% of company strategies fail due to disengagement and poor execution?

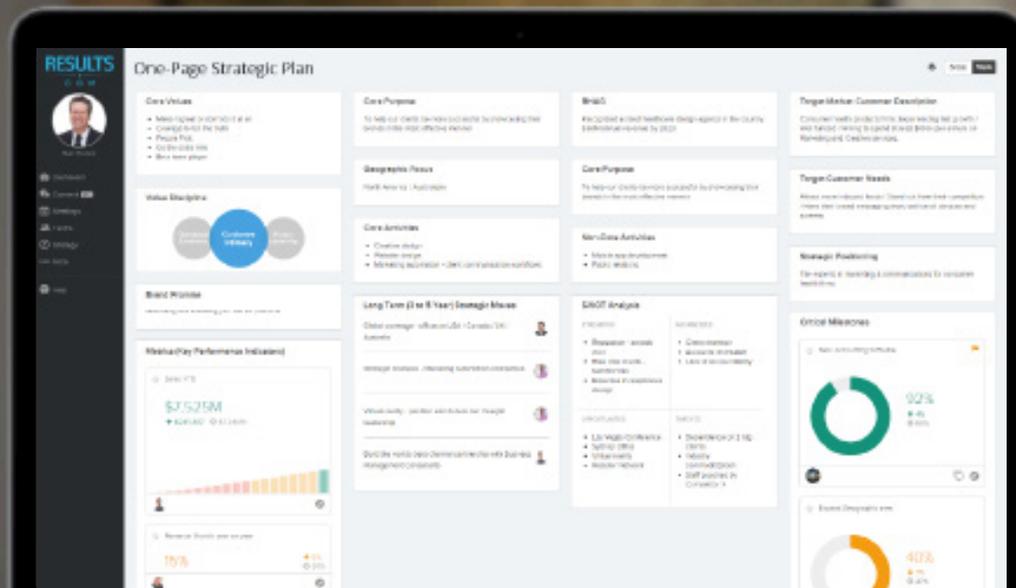
The Solution

A ResultsBI Strategic Plan That Everyone Is Engaged In



The ResultsBI Strategic Plan incorporates your core values, core purpose, goals, key performance indicators, and much more. As an on-line, one-page document, it can be broadly shared and easily understood by every team member and kept top-of-mind on a daily basis. It literally “gets everyone on the same page.” It’s the unifying document that clearly and simply informs your people about: 1) Who you are, 2) Where you are going, and 3) How you plan to get there.

An online, written Strategic Plan is the foundation that empowers your team to consistently achieve extraordinary results.



THREE STRATEGIC PLANNING PRINCIPLES



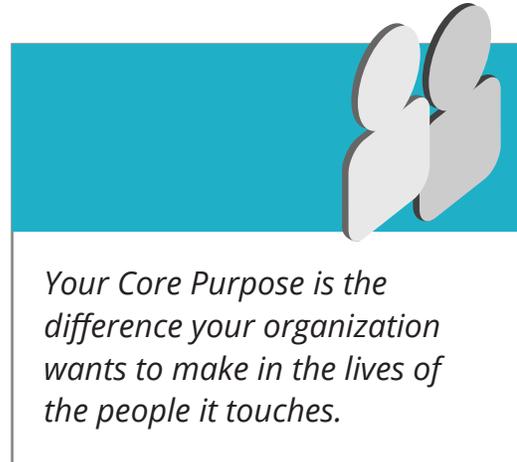
Principle #1:

YOUR CORE PURPOSE

Core Purpose communicates the difference you want to make in the lives of the people you touch.

A famous study by Gallup found that Millennials overwhelmingly want to contribute to an enterprise they believe in. Stanford University found the same of workers across the age spectrum.

But what does it mean to “believe in” an enterprise? What’s the workforce looking for?



Until recently, managers were taught that people work out of self interest, and that they will work for the highest remuneration. Most executives today were either taught this, or they became managers under mentors who had been taught this. Being a leader meant that you directed people’s behavior by apportioning rewards. That’s still important, but it’s not enough. Today, rewards have to exist in the context of a larger purpose. Earning a reward needs to mean that some greater good was also accomplished.

As our Results.com CEO, Marc Daniels, explains in one of our training videos, **“It’s not about making money. It’s about the difference you want to make in the world and the lives of the people you touch.”**

Leadership today means looking beyond your P&L to see what your business means—or could mean—to your customers, your community, and your employees.

How To Determine Your Core Purpose

This exercise is best done with co-founders and others with a long-term interest in your enterprise. Beware of answers that apply to everyone. “Customer satisfaction,” for example, is not a Core Purpose. It’s table stakes for any organization.

Your company exists to impact the world in a particular way. That’s your Core Purpose. “What” you do and “How” you do it will change over time.

But “Why” you do it won’t. Your Core Purpose is the “Why”.

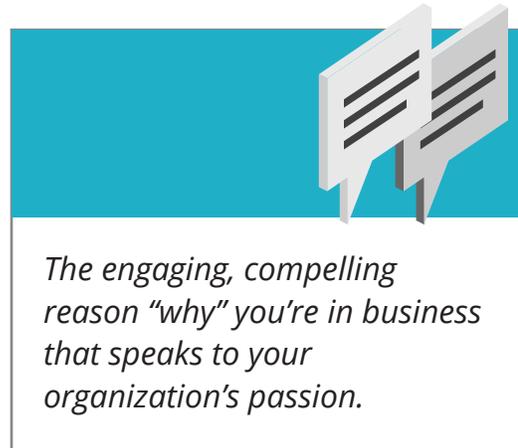
No matter what your business is, there’s a Core Purpose that your team will immediately appreciate.

To help you define it, start your Core Purpose with **“Our Core Purpose is to ____.”**

For example, let’s look at one of the oldest environmental groups in the world, the Sierra Club in the United States. Their Core Purpose is, in part, “to educate and enlist humanity to protect and restore the quality of the natural and human environment.”

They want to change the lives of the people they touch. It doesn’t say a word about how they’re going to do it. The “how” will change. But “why” they do it, to restore the environment, has been the same for over a hundred years. Everyone in their organization sees their work in the context of that big picture. This has a powerful transformative effect.

If you spell it out, your employees will see that their goals and tasks serve a greater purpose. Leaders who provide context build cohesive teams that leave competitors behind. **As Daniels says, “When you nail your Core Purpose, it has real power.”**



Principle #2:

STRATEGIC POSITIONING

“Highly engaged and satisfied employees can generate as much as a 104%-189% increase in profitability, whereas a poor organizational culture with disengaged employees can cost a company up to 22% of total revenues.”

— John Spence, *Letters to a CEO*

Today’s workforce is not only “digitally native,” but they may be the most business savvy ever. Millennials and their parents endured the worst financial crisis in nearly a century. Now that they’re on the mend, they need to know that their employer intends to succeed. They need to know what their employer stands for and how they are uniquely positioned in the marketplace.

Your customers won’t even start down the path to buy your product unless they think you’re remark-ably, distinctively, and meaningfully different. You don’t win the marketing battle with the best product or service.

You win the marketing battle with Strategic Positioning.

A lot of leaders have a hard time defining their Strategic Positioning for one simple reason: it means taking some options off the table. That often strikes them as counter-intuitive. If any industry can be disrupted, and if the whole point of strategic planning



The thing you want your customers to think of when they see or hear your brand name. The piece of mental real estate you want to “own” in the mind of your target customer.

is to become more adaptive, then how can taking options off the table help?

This is an instance where leadership needs to be laser focused so that their team can focus as well. Generalities work against you. “Best quality,” for example, is not Strategic Positioning. Your people are too business-savvy to accept that. It’s table stakes again, and it’s not enough to win in today’s market—or tomorrow’s.

Your Strategic Positioning shows how you are meaningfully different from your competitors. **It’s your “X-factor.”** Brands that stand for one thing generally win. Unfocused brands generally unravel.



566% Increase In ROI

A well-crafted Strategic Plan is the bridge to success. Over a 65-year period, visionary companies (those with Strategic Plans) had an increased return on investment of 566% vs. competitors who didn’t have them.

— *Stanford University Graduate School of Business Study*

How To Define Your Strategic Positioning

STRATEGIC TIP

What do you want people to think about when they hear your name? We make 95% of our decisions subconsciously, so the perception of value resides in the mind of the customer. They will believe what you believe, especially at first, but also as it's reiterated over time. Defining what you believe, and inviting your team to adopt it, can have a tremendous impact on your growth.

Do this by identifying how you will become a market leader in some specific way.

Find that aspect of your business that you want people to think about, and seek excellence there. Your best people want to be leaders, and they want to be excellent. It makes their work more satisfying. It will also help define your position in your market. Ultimately, you don't win market share with products and services. You win it with better positioning.

Identify your specific strategic position by answering these two questions:

- **In what area(s) could you be perceived as the leader of a category or niche in your industry?**
- **In what area(s) could you be perceived as being dramatically and meaningfully different from your competitors?**

Customers respond when your company can authentically and genuinely position itself as a leader. And when your staff thinks of itself as a leading team, they respond with advocacy.

Principle #3:

CORE ACTIVITIES

“if everything is a ‘core activity,’ then nothing is.”

— Marc L Daniels, *CEO, ResultsBI*

Core Activities are rooted in your Core Purpose and they’re essential to your Strategic Positioning. These are the must-do activities. You want to allocate resources to them. But it’s not always easy to know which products, services and activities are Core and which are not.

However, the decision to stop activities, or discontinue products and services that have outlived their usefulness is one of the keys to strategic leadership.

It often seems like this where your plans crash into reality. You want your Core Purpose to cascade through your Strategic Priorities so you can focus everyone on your Core Activities.

So, how do you change your organization to make it more effective for the future?

“The difference between successful people and VERY successful people is that VERY successful people say ‘NO’ to almost everything.”

— Warren Buffet,
Chairman & CEO,

Berkshire Hathaway



How To Determine Your Core Activities

Here's are two questions to ask yourself when evaluating the products and services in your portfolio, and the work done in your enterprise:

1) Is this activity or offering important for our long-term success in our industry?

Taking the long view helps identify the "essentials" and separate them from the "important" or "unavoidable" non-essentials that you want to phase out.

Identify your specific strategic position by answering these two questions:



Effective strategy requires the discipline to make wise choices about what you need to start doing, keep doing and, most importantly, what you need to stop doing, or not get into at all.

Determine which activities are really Core Activities by asking yourself:

2) Does this activity or offering truly differentiate us in the mind of the customer?

When the answer is "Yes," then that activity or offering has strategic value. It's a Core Activity. The excellence you bring to it makes you a leader. When your customer experiences it, it opens a relationship with them that should bring you long-term benefits and more customers. You'll want to invest more resources to Core Activities, and you'll want to keep certain jobs in-house. Everything else, optimally, could be outsourced or shut down.

A transition like this can cause stress across your workforce, which is why it's so important that everyone understands how your business fits together, and how they fit in. There are solid methods for making sure that you have your team's buy-in so they transition enthusiastically. That's out of scope here, but we're happy to show you how it's done when you're ready.

GETTING IT DONE

“A big part of strategy is making deliberate choices.”

— Marc L Daniels, *CEO, ResultsBI*

Now that you’ve taken a quick look at three of the most challenging parts of a complete strategic plan, you can see why a business that executes a defined strategy can dominate its market.

You make the best use of your people. Your team knows why your business exists, what makes it special, and how to lead. This awareness affects everything they do. When you bring strategic planning to life like this, everyone can see the vision and become engaged in accomplishing it.

But, the truth is: only 5% of businesses—the truly successful ones—are willing to do the basic work involved to run their businesses like this. If you’re ready to create real results for your enterprise... we can help you make it happen.

Your ResultsBI Strategic Plan

Comprised of 3 parts and 15 sections, your Strategic Plan is the unifying document that gets everyone on the same page. **It has everything you need to create a winning strategy that will inspire your team and grow your organization, including: software, videos and workbooks to expertly guide you through the creation of each section.**

Part 1. VISION

- Core Values
- BHAG — “Big Hairy Audacious Goal”
- Core Purpose

- Target Market Customer
- Value Discipline
- Core vs. Non-Core Activities
- Strategic Position

Part 2. STRATEGY

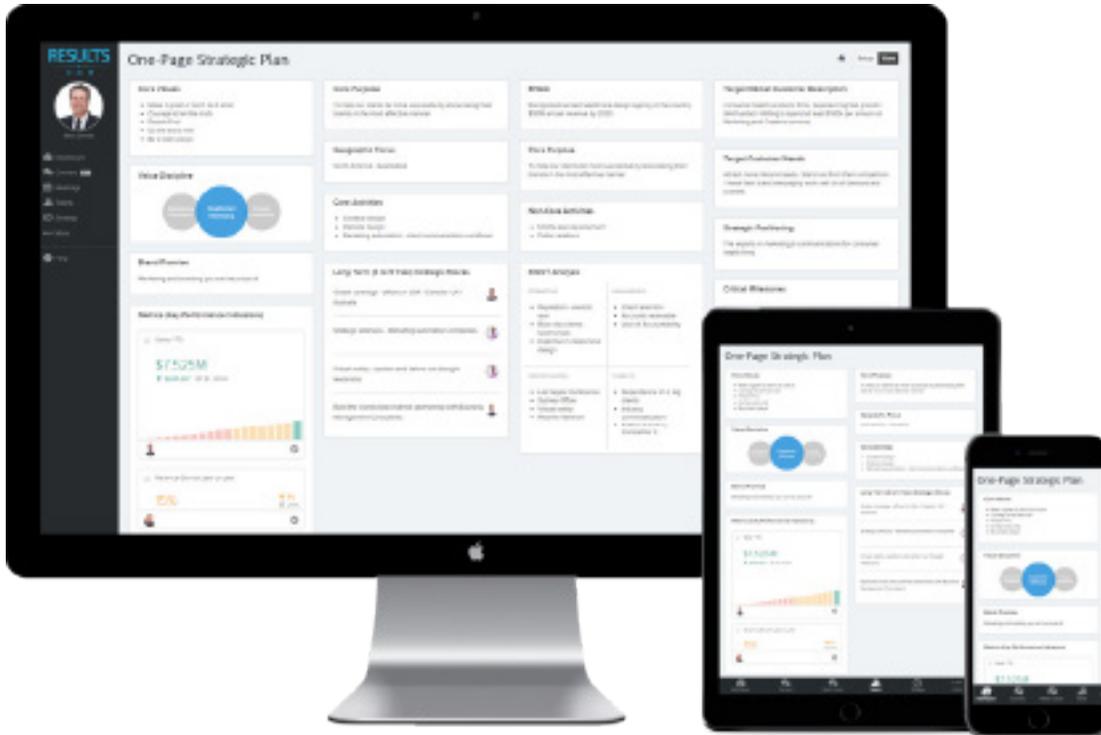
- Key Benefits
- Brand Promise
- Industry Analysis
- 3 to 5 Year Strategic Moves

Part 3. EXECUTION

- Numerical Targets
- SWOT Analysis
- Current Strategic Projects
- Metrics (Key Performance Indicators)

RESULTS BI

Strategy Execution Compass



ResultsBI Strategy Execution Compass

- Has a step-by-step wizard that literally walks you through the entire Strategic Planning process.
- Coaches you on every aspect of your plan with clear, action-oriented videos.
- Includes workbooks that guide your thinking.

The Strategic Execution Compass software helps you execute your strategic plan. It includes:

- A Integrated Meeting Interface that creates accountability and drives execution.
- PowerBI dashboards for tracking your results
- Dashboard for tracking your Strategic Projects and Tasks

Learn more at ResultsBI.com

FAST TRACK

Your Company's
Strategic Plan in
just 5 days...



If you are feeling overwhelmed, stressed, directionless, and fearful about the future it does not have to be that way. ResultsBI makes Strategy Easy! We guide you through the assembly of your company's strategic plan, providing a clear path to growth and financial stability.

Join the FAST TRACK — invest just an hour a day, over 5 days and you will have a Strategic Plan. The FAST TRACK includes access to TheResultsBI Strategy Execution Compass so you not only have a plan, but software that will drive execution. To learn more visit:

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