



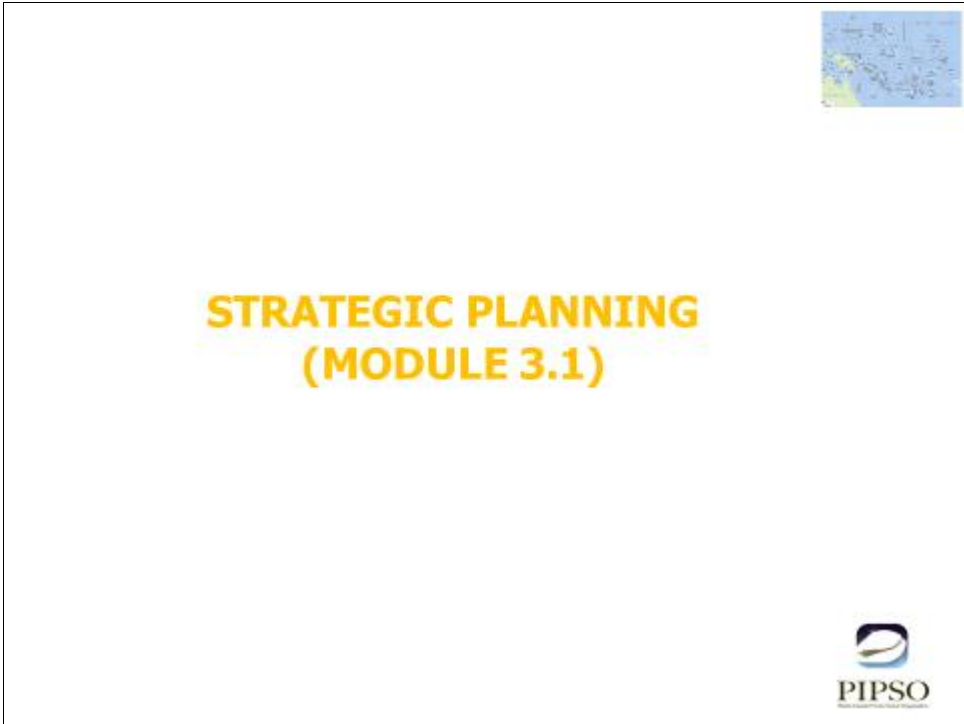
STRATEGIC
PLANNING

February 17

2017

This Module looks at the components of strategic planning, several models that may be used to establish a Strategic Plan & then demonstrates this process using the PIPSO Strategic Plan for 2016-2019.

MODULE
3.1



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PURPOSE

This Module looks the nature & attributes of each of the components of a Strategic Plan, as follows:

- Mission
- Vision
- Values
- Strategy

Participants are given the opportunity to consider each of these components & what they may mean for their specific business.

We next consider several models that may be adopted when first establishing a Strategic Plan & putting in place the framework for future assessment & reassessment of the businesses place in society & market(s) together with its strategy to maintain or change to meet its mission, vision & values.

Finally, we consider a particular approach based on an annual rhythm using strategic pillars that may be adopted to establish an annual planning framework & operating cycle to renew the Strategic Plan & its impact on the Business Plan, Financial Plan & annual Operating Plan & Budget.

While this Module approaches the topic from a particular direction, it is not intended to recommend or dictate a particular model to participants. The objective of this Module is to stimulate participants to look at the range of available models with a view to choosing one suitable to their business for its adoption & implementation thereof.

On completion of this Module, participants should have a better understanding of what is required to establish & reset annually a Strategic Plan for their own business.

WHAT IS STRATEGIC PLANNING

A strategic plan is a living document that sets out the future view of the business & its place in its surrounding environment & society. It describes its goals & strategies that it chooses within the overall ideological framework that the owners, Board & senior executive determine.

This plan, at least in part, is often made public via the business website & depicts the values, vision & mission for the business.

The strategic plan provides longer term goals for management and workers alike. In larger businesses it is important to establish a framework within which each individual can gain a sense of achievement from their tasks towards the bigger picture goals. It is also important that the informal internal values & practices match the formal values & written practice & procedures statements. In this way all may share the long-term vision & supporting values.

If a business is to operate positively within the society that surrounds it, there is a public relations aspect to be considered. For external but interested parties a strategic plan can give insight into the direction being taken & the actions anticipated by the business in the near & more distant future to make its place in society.

WHAT IS STRATEGIC PLANNING?



Components of a strategic planning:

1. **Mission – statement of purpose**
2. **Vision – future place of business in society**
3. **Values – stakeholder culture & guiding principles**
4. **Strategy – a roadmap of general steps**



Let's consider each of the components of the Strategic Plan in turn. But, before we do, we have a chicken & egg problem. Which comes first?

Rank the following in the order that you would prepare each one.

- Mission
- Vision
- Values
- Strategy

NOTE FOR FACILITATOR

Ask participants for their views. There is no correct answer, however Mission Statement, vision & values are closely linked. Values is most frequently put at the top.

Discuss in open forum the connectivity between these components.

Many models use Values as the starting point. The values being those of the business owners, board & senior management. However, usually a well-constructed Mission Statement is the most visible external expression of the business goals, often displayed on letterheads & other external & internal correspondence & locations.


An internet search will find a wide variety of alternative diagrams, but many amount to the same thing. They are visually different only. If planning for the first time, choose a model that meets the preferences of the planner(s).

MISSION

A mission statement, or a statement of purpose, provides a business the opportunity to succinctly explain the intended impact of vision & values. If brief enough it may be used together with a logo to achieve a visual impact when viewed by outside interests & within the organisation.

This statement should include brief mentions of the customers served, the needs being met or product/service offered, and how it will be supplied.


MISSION



The mission statement of a business should:

- Be brief
- State the customers served
- The services provided
- The means of doing so

What is/might be your Mission Statement?



Let us now look at the mission statements of two world leading businesses.

Do they meet the above criteria?

MISSION



- To refresh the world
- To inspire moments of optimism & happiness
- To create value & make a difference

Who's mission statement?

Coca Cola



MISSION



To organize the world's information & make it
universally accessible & useful.

Who's mission statement?

Google



MISSION

To be our customers' favorite place and way to eat and drink. Our worldwide operations are aligned around a global strategy called the Plan to Win, which center on an exceptional customer experience – People, Products, Place, Price and Promotion.

Who's mission statement?



Do the Coca Cola, Google & Mc Donald's mission statements meet the criteria? Are they brief & do they state the customers served, the services provided& the means of doing so?

Not entirely, yes? But they are easily understood, perhaps even inspiring, once matched to the business.

Note the use of the 5 P's of marketing in the McD mission. We'll see these again later.

MISSION

Activity 3.1.1

Critically assess Apple's mission statement?

What about Steve Jobs' mission statement?

Your preference is Why?



ACTIVITY 3.1.1

ASSESSMENT OF A MISSION STATEMENT

The mission statement of a business should:

1. *Be brief*
2. *State the customers served*
3. *The services provided*
4. *The means of doing so*

PART 1

The current mission statement of Apple follows.

“Apple designs Macs, the best personal computers in the world, along with OS X, iLife, iWork and professional software. Apple leads the digital music revolution with its iPods and iTunes online store. Apple has reinvented the mobile phone with its revolutionary iPhone and App store, and is defining the future of mobile media and computing devices with iPad.”

To what extent does this statement meet each of the criteria listed?

Provide an answer to each of the 4 points together with a summary statement on the impact of the statement on you as a reader within the sections provided hereafter.

ANSWER

PART 1 – Current Apple Mission Statement (A)

1. *Be brief*

2. *State the customers served*

3. *The services provided*

4. *The means of doing so*

Summary Statement

PART 2- Steve Jobs Apple Mission Statement (B)

The mission statement of Apple while Steve Jobs was CEO follows.

"To make a contribution to the world by making tools for the mind that advance humankind."

To what extent does this statement meet each of the criteria listed?

Provide an answer to each of the 4 points together with a summary statement on the impact of the statement on you as a reader within the sections provided hereafter.

ANSWER

PART 2- Steve Jobs Apple Mission Statement (B)

1. *Be brief*

2. *State the customers served*

3. *The services provided*

4. *The means of doing so*

Summary Statement

PART 3 - Which Mission Statement do you prefer? Why?

ANSWER

Which Mission Statement do you prefer?

I prefer Statement A / Statement B (Cross out one)


Why?

VISION

Simply put, Vision is an explanation of where the organization would like to be in the future & how the society will look as a consequence &/or due to other influences.

Vision should include achievements to be made internally & their direct & indirect impact on its customers &, perhaps, the state of society overall. Vision is a longer term concept that should change only slowly under normal circumstances. It provides insight as to how the organization perceives itself in a larger context. It is not limited to the time horizon typically used in doing a business plan, i.e. 5 years.

VISION




What will the business look like in the future?

- From an internal viewpoint
- In the context of the community/society

What attributes should be addressed in detailing a business's vision?

Address internal & community attributes separately.



NOTE FOR FACILITATOR

Ask participants for their business's vision, addressing internal & external attributes separately.


Discuss.

Are there any common themes that emerge re the internal attributes of the businesses present at the workshop or their attitude to customers & the society in which they see themselves operating?

VALUES

All Strategic Plans are initially based on the ethics, personal values and beliefs of the stakeholders in the business. These provide the guiding principles & culture of the business & should ultimately be shared by managers & workers in the business if unnecessary conflict & a divergence of internal values from the external, or written, values is to be avoided.


VALUES



These are the guiding principles & beliefs of the business stakeholders

- The culture the business promotes
- The framework used by the people in the business
- The informal & formal values must match

Do the values match the vision?



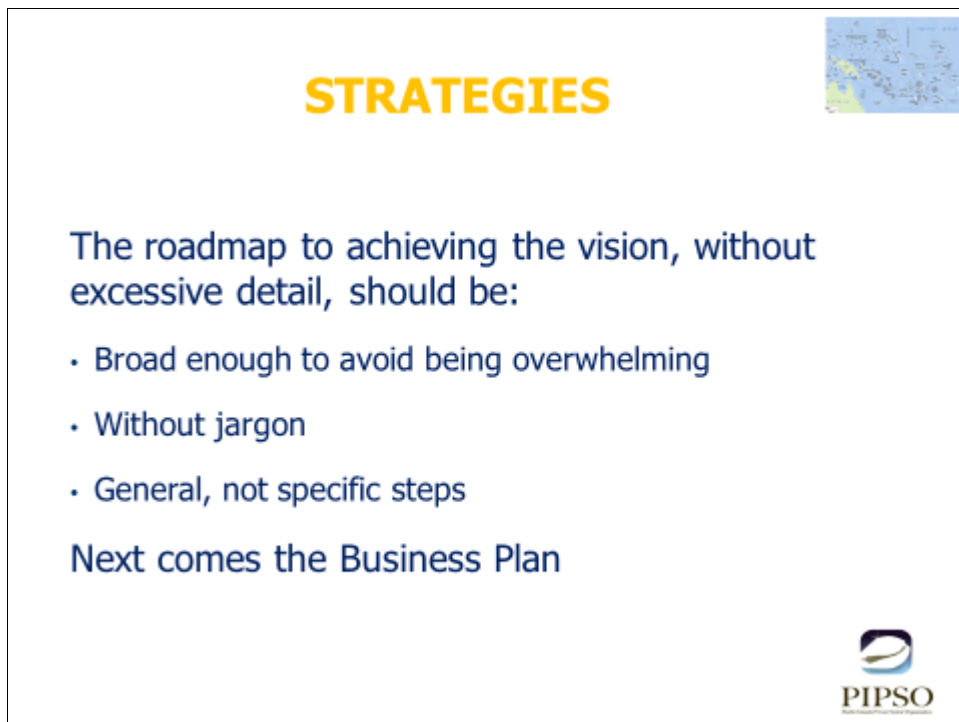
Values should provide readers, internal & external, with an understanding of the culture, as well as the framework being applied for business planning purposes.

If the values do not match the vision conflicting messages will be sent within the business, to its customers, present & future, & the wider community. It is not just what is written, but what is practiced that matters.

STRATEGIES

As the link between what is now & the future Vision, this section should provide the strategic plans that the business is putting in place to achieve the stated goals implied by the values, vision & mission. While this is a roadmap, it is important to keep this aspect of the strategic plan broad enough so that the reader will not be overwhelmed with jargon or excessive details. It should provide the stepping stones for achieving envisaged outcomes.

Often this turns into a to-do list rather than an expression of general steps being taken. This is the wrong approach.



STRATEGIES

The roadmap to achieving the vision, without excessive detail, should be:

- Broad enough to avoid being overwhelming
- Without jargon
- General, not specific steps

Next comes the Business Plan

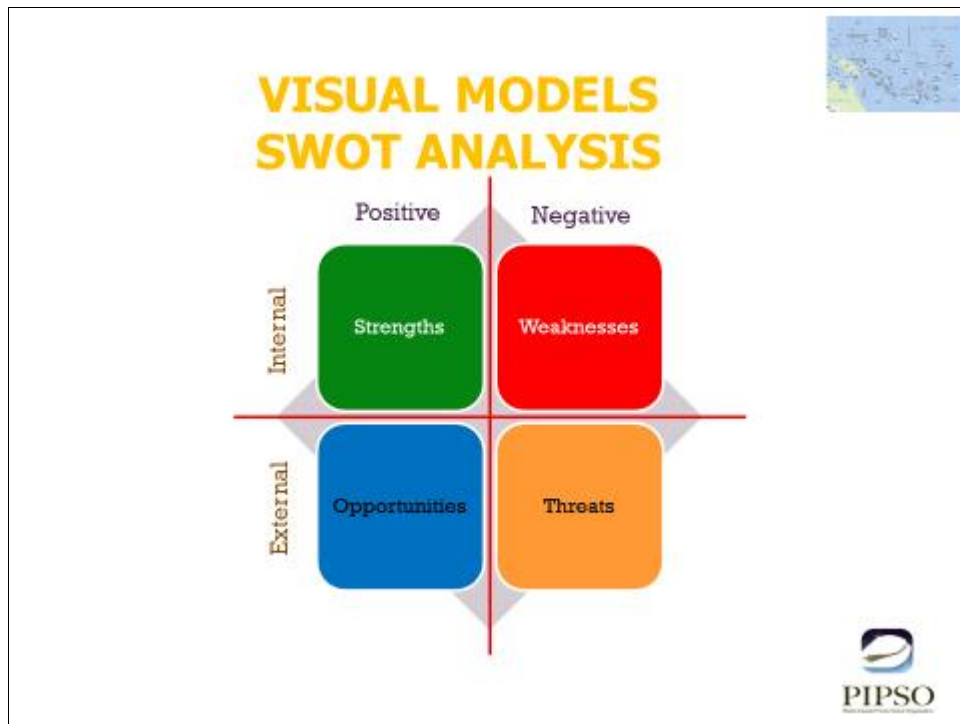
PIPISO

The tactics, logistics & administration processes used to achieve the long-term strategies in business planning horizon are spelt out in the Business & Financial Plans. These, in turn, are followed by the annual Operational Plan & Budget with very specific, quantifiable outputs designed specifically to meet the annual plan as required in line with the broader strategic outcomes sought.

VISUAL MODELS

There are a wide range of visual models for developing a Strategic Plan. Use an internet search engine, e.g. Google, to view many of these before choosing one that fits your view of business & society.

Let's look at just a few, firstly SWOT analysis as follows.



SWOT analysis is a planning tool. It is an excellent way to analyse an existing or new business. It is a structured planning method that evaluates the four elements of a project or business venture. A SWOT analysis can also be carried out for a product, place, industry, or person. It involves specifying the objective of a business venture or project and identifying the internal & external factors that are favourable & unfavourable to achieve that objective. The Acronym stands for:

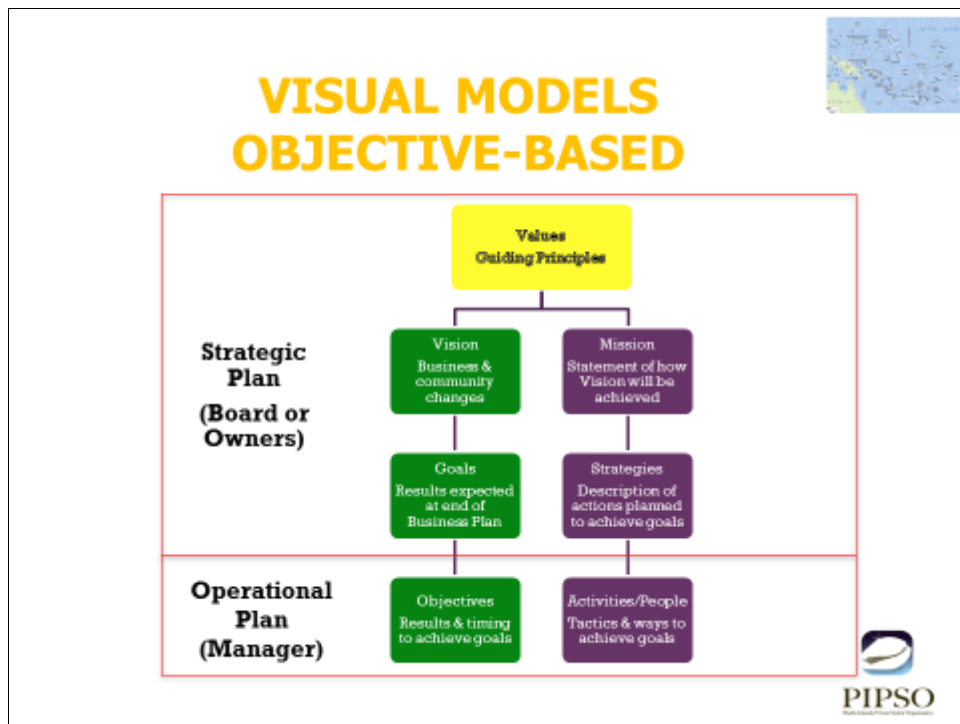
- Strengths: characteristics of the business or project that give it an advantage over others
- Weaknesses: characteristics that place the business or project at a disadvantage relative to others
- Opportunities: elements that the business or project could exploit to its advantage
- Threats: elements in the environment that could cause trouble for the business or project

The degree to which the internal environment of the firm matches with the external environment is expressed by the concept of strategic fit, which expresses the degree to which an organization is matching its resources & capabilities with the opportunities in the

external environment. The matching takes place through strategy & it is therefore vital that the business has the actual resources & capabilities to execute & support the strategy. Strategic fit can be used actively to evaluate the current circumstances of a company or individual(s) intending to undertake a new venture.

If a business applies a SWOT analysis & fails the strategic fit test, it should not proceed with the venture.

Next, let's look at an objective based model.



The first thing we notice is that this model begins with values, those of the proprietors, Board & senior executive (originators). Before moving further into the model the originators must determine what they believe in, what is right & what is important.

Once this is done a vision may be sighted which integrates the business, customers & the community. This vision determines the (very) long term goals from which a Mission Statement can be developed to provide a broad, statement of what the originators will do to achieve the vision. Ideally, this should be brief. If too long an abridged version may be employed for use atop letters & other correspondence, business cards, web-pages etc.

Broad goals & results sought to be achieved by the end of the planning period may be developed from the vision based on a, say, 5 to 10-year time frame. Strategies or a general description of broad approaches may now be framed as the means to achieve the goals.

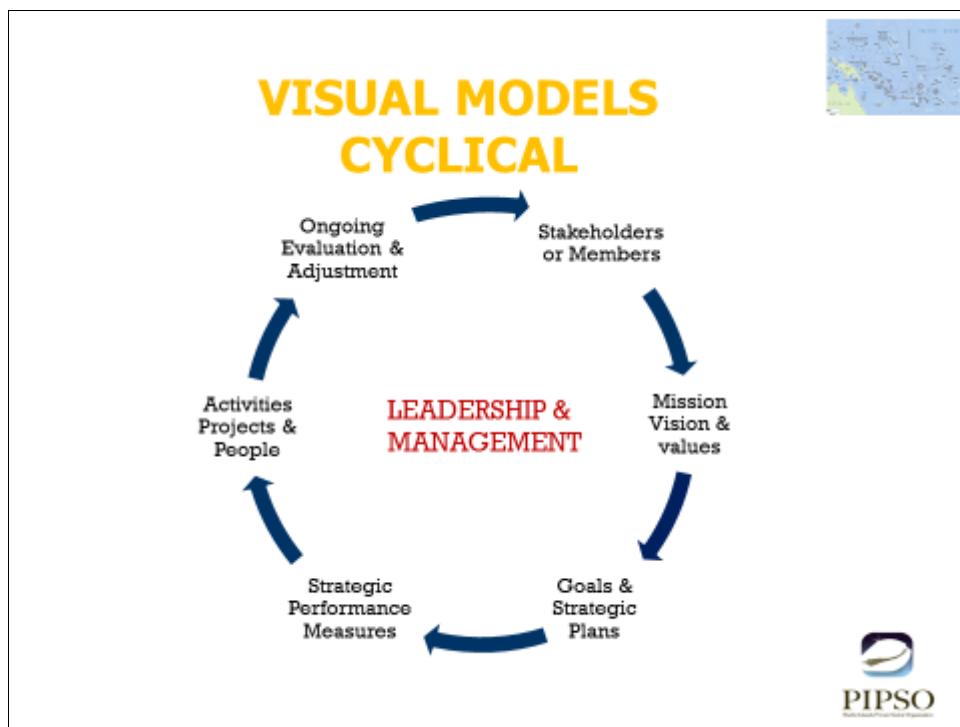
This mix forms the Strategic Plan for the business. Next follows the Business Plan.

Management then can put in place annual Operational Plan & Budget to meet the short-term & more immediate goals. While operational plans are linked to the business cycle &

therefore may exceed one year in time, milestones should be set & met within the plan. These comprise time limited activities & tactics in the form of programmes, services & the administrative framework to implement the strategies & so doing achieve the longer-term objectives.

A limitation of this objective-based model is that it does not describe the process of adjustment that needs to occur in order to keep the Strategic Plan & its components on track & relevant to subtle changes in society, market places & the business as it develops.

This deficiency may be overcome by adding a cyclical model, based on annual review, reassessment & renewal as follows.



Where does this model begin or end?

This process of renewal & reinvention normally requires an annual review process. This topic will follow.

NOTE FOR FACILITATOR


Participants will mostly say begin at Stakeholders & end at Ongoing Evaluation or say that the process is continuous, has no beginning or end. The difference is, of course, whether this is being done for the first or a subsequent time. Once commenced it is continuous.

**VISUAL MODELS
OBJECTIVE-BASED**

Activity 3.1.2

Compare the mission, vision & values
statements of Google & Coca Cola.

Which do you prefer? Why?



ACTIVITY 3.1.2

COMPARING MISSION, VISION & VALUES

The mission, vision & values of Coca Cola & Google follow. Which do you consider to be better? Why?

It is recommended that participants view the websites for Coca Cola & Google in order to better assess the merits, presentation & full content of each.

GOOGLE

Mission Statement – *“To organize the world’s information & make it universally accessible & useful”.*

Vision statement - *“to provide access to the world’s information in one click.”* (Source: Panmore Institute)

WHAT WE BELIEVE - Ten things we know to be true

We first wrote these “10 things” when Google was just a few years old. From time to time we revisit this list to see if it still holds true. We hope it does—and you can hold us to that.

1. Focus on the user and all else will follow.
2. It’s best to do one thing really, really well.
3. Fast is better than slow.
4. Democracy on the web works.

5. You don't need to be at your desk to need an answer.
6. You can make money without doing evil.
7. There's always more information out there.
8. The need for information crosses all borders.
9. You can be serious without a suit.
10. Great just isn't good enough.

COCA COLA

Mission Statement

- To refresh the world
- To inspire moments of optimism & happiness
- To create value & make a difference

Vision Statement

Our vision serves as the framework for our Roadmap and guides every aspect of our business by describing what we need to accomplish in order to continue achieving sustainable, quality growth.

- **People:** Be a great place to work where people are inspired to be the best they can be.
- **Portfolio:** Bring to the world a portfolio of quality beverage brands that anticipate and satisfy people's desires and needs.
- **Partners:** Nurture a winning network of customers and suppliers, together we create mutual, enduring value.
- **Planet:** Be a responsible citizen that makes a difference by helping build and support sustainable communities.
- **Profit:** Maximize long-term return to shareowners while being mindful of our overall responsibilities.
- **Productivity:** Be a highly effective, lean and fast-moving organization.

Our Winning Culture

Our Winning Culture defines the attitudes and behaviors that will be required of us to make our 2020 Vision a reality.

Live Our Values

Our values serve as a compass for our actions and describe how we behave in the world.

- **Leadership:** The courage to shape a better future
- **Collaboration:** Leverage collective genius
- **Integrity:** Be real
- **Accountability:** If it is to be, it's up to me
- **Passion:** Committed in heart and mind
- **Diversity:** As inclusive as our brands
- **Quality:** What we do, we do well

PIPSO STRATEGIC PLAN

Enough theory for now. Let's look at a practical example. The PIPSO Strategic Plan 2016-2019 is used hereafter to demonstrate the approach that may be used.



PIPSO's vision & mission are naturally framed around:

1. The private sector
2. Advocacy
3. The Pacific region
4. It's members & their members

NOTE FOR FACILITATOR

Provide copies of the PIPSO Strategic Plan to participants for their perusal.

PIPSO STRATEGIC PLAN



GUIDING VALUES

Relevance	Leadership
Innovation	Teamwork
Integrity	Outreach



GUIDING VALUES: The work we do and the way we do it is premised on the following:

- *Relevance*: We deliver to our members and the wider Pacific business community timely and relevant information, programs and services, that deliver measurable results.
- *Innovation*: We embrace and encourage new ideas and creative thinking to strive for continuous improvements of organisational operations and programs.
- *Integrity*: We conduct business with honesty and integrity and making decisions to ensure future stability and sustainability.
- *Leadership*: We promote and provide leadership that embraces our membership and impacts the direction of the wider Pacific business community.
- *Teamwork*: We cultivate a culture of teamwork to accomplish goals and objectives and empower staff and partners we work with.
- *Outreach*: We reach out, be transparent, and communicate our work using the most appropriate communication and information tools and methods.

PIPSO STRATEGIC PLAN



STRATEGIC FOCUS AREAS

1. Supporting NPSO's to be strong & responsive organisations	3. Championing the interests of private sector in the appropriate fora
2. Assisting Pacific businesses to enhance their business competitiveness & growth	4. Ensuring the sustainability of PIPSO's resources & enhancing its capacity



We now look at each of the strategic focus areas & break each of them down into three objectives.

THE FORWARD AGENDA

THE FORWARD AGENDA



Strategic Focus Area 1: Supporting NPSO's to be strong & responsive organisations



1. Schedule of capacity building training programmes & associated assistance
2. Establish Business e-Hub Centre, i.e. build guidelines & templates for NPSO use
3. Define information clearing house role with support from PIPSO



PIPSO

THE FORWARD AGENDA



Strategic Focus Area 2: Assisting Pacific businesses to enhance their business competitiveness & growth



1. Multi-pronged & coordinated industry research & capacity building programmes for Pacific businesses
2. Innovative credit & funding schemes
3. Business networking & counseling support services



PIPSO

THE FORWARD AGENDA



Strategic Focus Area 3: Championing the interests of private sector in the appropriate fora

1. **Effective regional & national consultative dialogue processes**
2. **Compile & disseminate private sector research, surveys & advocacy papers**
3. **Establish pathways & projects for collaboration under PPPs**

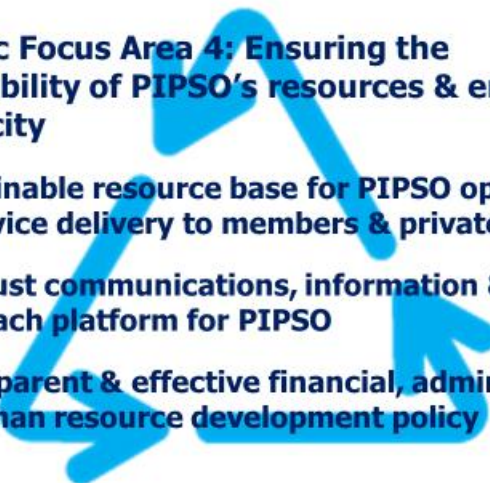


THE FORWARD AGENDA



Strategic Focus Area 4: Ensuring the sustainability of PIPSO's resources & enhancing its capacity

1. **Sustainable resource base for PIPSO operations & service delivery to members & private sector**
2. **A robust communications, information & outreach platform for PIPSO**
3. **Transparent & effective financial, administrative & human resource development policy**



PIPSO's M&E framework captures principles pertaining to Managing for Development Results, a management strategy that focuses on using performance information to improve decision-making and focus on the achievement of outcomes; and the SDGs. These are essential to demonstrate that the work PIPSO does and its interventions are making a difference or contributing to making a difference to the lives of those in the Pacific private sector. For PIPSO this puts two things in context:

- It enables PIPSO to use information to make better decisions for its programmes and for institutional strengthening capacities and resources; and
- Ensures that concerted efforts and resource mobilisation are supporting those goals and objectives articulated in this PIPSO Strategic Plan, and supporting the wider auspices of the Pacific regional private sector development agenda.

MONITORING & EVALUATION

MONITORING & EVALUATION

PIPSO's commitment to M&E includes:

1. Commitment of resources & time to M&E activities
2. Capturing performance information to improve decision-making & focus on achievement of outcomes
3. Linking of project results to PIPSO's broader goals
4. Consistency with national reporting & monitoring obligations



MONITORING & EVALUATION

PIPSO's commitment to M&E includes the following ongoing activities:

1. An annual work plan accountable to its:
 - a. Board of Directors
 - b. Development partners
2. Publicly sharing developments through:
 - a. Annual reports & other publications
 - b. Active updates on its website
 - c. Regular relevant releases to social media



Now go & do it for your business.

This ends Module 3.1

ANSWERS TO ACTIVITIES

ACTIVITY 3.1.1

ANSWER - ASSESSMENT OF A MISSION STATEMENT

PART 1 – Current Apple Mission Statement (A)

The current mission statement of Apple follows.

“Apple designs Macs, the best personal computers in the world, along with OS X, iLife, iWork and professional software. Apple leads the digital music revolution with its iPods and iTunes online store. Apple has reinvented the mobile phone with its revolutionary iPhone and App store, and Apple has reinvented the mobile phone with iPad.”

To what extent does this statement meet each of the criteria listed?

5. *Be brief*

The statement is not brief. It is very long & product specific

6. *State the customers served*

The statement uses the names of specific current products rather than the customers who may use the products. Despite its length it does not state the customers served by the products.

7. *The services provided*

There is a long list of current branded products provided, but no mention of future innovation. The statement is product specific rather than broad enough to cover a range of new products or changes in the markets in which it operates.

8. *The means of doing so*

There are a couple of statements alluding to the means, i.e. “Apple has reinvented the mobile phone” & “Apple has reinvented the mobile phone”, but these are statement of the present, not the future.

Summary Statement

Apple's current mission statement:

1. Talks about now. There is a mission, but no vision for the future.
2. Is inward looking, comes off as a bit myopic.
3. Is product specific. Has Apple new product ideas or run out of ideas?
4. Sees its products now as the purpose of the company's existence.
5. Lacks flare or imagination; is uninspiring(?), or is it?

PART 2 - Steve Jobs Apple Mission Statement (B)

The mission statement of Apple under Steve Jobs follows.

"To make a contribution to the world by making tools for the mind that advance humankind."

To what extent does this statement meet each of the criteria listed?

5. Be brief

This statement meets the criterion

6. State the customers served

States "the world" & "humankind", a very wide, but clear, target market

7. The services provided

A very sweeping statement "To make a contribution ... by making tools for the mind" but one that is understandable. Is it too broad?

8. The means of doing so

The means are "the tools". These are undefined, but instantly "brand" recognizable as "Apple".

Summary Statement

The statement is altruistic; the stakeholders are everyone in the world. It is outward looking, bold, inspirational & not product specific.

This reflects Jobs' ethos & statements from his family members after his death – that what satisfied him most was watching kids use Apple products in the classroom.

PART 3 - Which Mission Statement do you prefer? Why?

The most fundamental difference between Apple's current ideals and Jobs' vision is that Jobs saw Apple products as a tool to improve the quality of life for mankind in the long term. In contrast, Apple sees its products not as a tool for advancement but as the purpose of the company's existence now.

It is a matter of opinion, but the Steve Jobs mission statement appears more enlightened & forward thinking.

Which Mission Statement motivates you?

ACTIVITY 3.1.2

COMPARING MISSION, VISION & VALUES

The mission, vision & values of Google & Coca Cola follow. Which do you consider to be better? Why?

It is recommended that participants view the websites for Google & Coca Cola in order to better assess the merits, presentation & full content of each.

GOOGLE

Mission Statement – “To organize the world’s information & make it universally accessible & useful”.

This statement does meet 2 of the 3 components of our expectations from a mission statement. It does not include the means of providing its services. To be fair, this might become rather wordy. On balance it is sound.

Vision statement - “to provide access to the world’s information in one click.” (Source: Panmore Institute)

The vision statement above is identified by the source, but is not visible on Google’s website if explored with the mission statement appearing to cover both purposes. If so it does not do this effectively.

WHAT WE BELIEVE - Ten things we know to be true

We first wrote these “10 things” when Google was just a few years old. From time to time we revisit this list to see if it still holds true. We hope it does—and you can hold us to that.

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9. You can be serious without a suit.
10. Great just isn’t good enough.

The above statements appear to fill the space normally left for a values statement. They are an effective mix values for a business of this type. On the website there is much more detail about each of the “10 things” for those interested in this level of detail. Opinion on the effectiveness of the website in meeting the expectations of mission, vision & values is likely to vary.

COCA COLA

Mission Statement

- To refresh the world
- To inspire moments of optimism & happiness
- To create value & make a difference

Statement seems to be an attempt to inspire rather than meet the normal expectations of a mission statement. It does not define the services provided or the means of so doing. It is probably successful as an inspirational statement, but provides little more.

Vision Statement

Our vision serves as the framework for our Roadmap and guides every aspect of our business by describing what we need to accomplish in order to continue achieving sustainable, quality growth.

- **People:** Be a great place to work where people are inspired to be the best they can be.
- **Portfolio:** Bring to the world a portfolio of quality beverage brands that anticipate and satisfy people's desires and needs.
- **Partners:** Nurture a winning network of customers and suppliers, together we create mutual, enduring value.
- **Planet:** Be a responsible citizen that makes a difference by helping build and support sustainable communities.
- **Profit:** Maximize long-term return to shareowners while being mindful of our overall responsibilities.
- **Productivity:** Be a highly effective, lean and fast-moving organization.

Vision statement is clear & relatively detailed. While it is full of hyperbolic motherhood statements, a reader would not know much about the service or product having read both the mission & vision statements. Clearly, however, these statements show an intention to be a market leader, not a follower, as Coca Cola clearly is.

Our Winning Culture

Our Winning Culture defines the attitudes and behaviors that will be required of us to make our 2020 Vision a reality.

Live Our Values

Our values serve as a compass for our actions and describe how we behave in the world.

- **Leadership:** The courage to shape a better future
- **Collaboration:** Leverage collective genius
- **Integrity:** Be real
- **Accountability:** If it is to be, it's up to me
- **Passion:** Committed in heart and mind
- **Diversity:** As inclusive as our brands
- **Quality:** What we do, we do well

Values are, once again, clearly stated. The challenge for Coca Cola is to practice what they preach. Do they in your opinion?

Once we get past the passionate mission statement, the vision & values are well articulated.

Which do you consider to be better? Why?

Answers may vary. Any of the issues raised above may be raised as relevant or other comparative differences. As long as some critical assessment has occurred & the justification for the conclusion is clear either might be considered superior.

It is probable that the Coca Cola statements, when taken as a whole, will be preferred as it does meet the normal expectations better (other than the mission statement), but this conclusion is not mandatory.