Converting problems into opportunities

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Management Consultants
For Planning & Implementation Services
Strategic, Financial, Resource Development & Marketing Needs

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Executive Summary

Organizational planning can be a frustrating and challenging process for many organizations. Many planning processes end up as unproductive time and the results bound into binders and headed for a shelf. Planning and implementation are ongoing processes that, when they are effective, relevant, and efficient to meet the needs of the organization, will help an organization to keep on track but have the flexibility to adapt to changing conditions. The process outlined in this proposal allows for a system that not only details the components of the planning process but has imbedded within each process, implementation of the plan and a system for benchmarking and outcomes assessment. By establishing a planning system with separate components, one change in one component can quickly impact on the rest of the planning process. By seeing the whole picture from stakeholder analysis which impacts the marketing plan after the information from the stakeholder analysis is filtered through the strategic plan, a holistic, integrated, planning system becomes a living document. Because the components can also be “stand alone planning systems”, implementation of the separate process can be adjusted to meet the needs of the various organizations while still providing a common planning language. Training for the separate processes can be facilitated, taught in workshop settings, or training tools for small or large groups.
Process

- Stakeholder Analysis Plan Process
- Strategic Plan Development Process
- Business Plan Development Process
- Subsidiary Plan Development Process
  - Funding Plan Development Process
  - Communications Plan Development Process
  - Tactical Marketing Development Process
  - Strategic Marketing Development Process
**Stakeholder Analysis Plan Process**

The Stakeholder Analysis answers the following questions. It is designed to come with the organization’s critical stakeholders and the communication strategies which will tie into the tactical and strategic marketing plans.

- Who are our stakeholders?
- What are the stakeholder coalitions?
- What is the nature of stakeholder interests?
- What is the power our stakeholders have over us?
- What responsibilities do we have to our stakeholders?
- What are our communication strategies to our stakeholders?

**Strategic Plan Development Process**

The Strategic Plan development process is designed to develop a strategic plan for the organization. Below are the components of a strategic plan which can be modified for each organization’s individual needs.

- Mission Statement
- Current Business Definition
  - Statement of Purpose
  - Definition of Markets
  - Competitive Advantages
  - Statement of Values
- Long Term Objectives
- External Analysis
  - General Environment
  - Industry Environment Analysis
    - Industry
    - Major Competitors Assess
    - Competitive Forces
  - Summary of Opportunities and Threats
- Internal Analysis
  - Value Chain Analysis
    - Primary Activities
    - Support Activities
  - Organizational concerns
    - Organizational capabilities
  - Financial Ratio Analysis
  - Summary of Strengths and Weaknesses
- Key Issues
- Basic Options
- Evaluation and Choice
- Strategy Statement
- Action Plan
Business Plan Development Process

The business plan development process is a framework designed to be used in order to develop a business plan for the organization that ties into the stakeholder analysis and strategic plan. Below are the components of a business plan which can be modified for each organization’s individual needs.

History
  Background of Principals

The Proposal
Objectives of the Business Plan
  Marketing Research Results: Competitive Analysis
  Marketing Research Results: Analysis of the Opportunity

The Product
Marketing Strategy
Marketing Plan
  Development of the Marketing Mix
  Promotion
  Price
  Product
  Place
  Service and Warranty Policies

The Management Team & Operations
  Organization
  Key Personnel
  Board of Directors
  Compensation & Incentives
  Policies & Agreements
  Supporting Professional Advisors & Services

Design & Development Plan
  Development Status & Tasks
  Overall Schedule Difficulties & Risks
  Product Improvement
  Facilities & Capacity
  Regulatory, other Compliances & Approvals

Financial Plan
  Operating Plan Forecast
  Pro Forma Balance Sheet
  Pro Forma Profit Analysis
  Break-Even Analysis
  Pro Forma Cash Flow Analysis
  Ratio Analysis

Objectives & Goals Revenue Goals
  Marketing Goals
  Development Goals
  Quality Assurance Goals
  Management Development Goals

Organization’s Edge
Future Possibilities
Subsidiary Plans Development Process

**Funding Plan Development Process**
The funding plan development process is a framework designed to be used in order to develop a funding plan which ties into the stakeholder analysis, strategic plan, and business plan. Below are the components of a funding plan which can be modified for each organization’s individual needs.

- Executive Summary
- Company Situation
- Objectives of Funding Sources
- Strategy of Development of Funding Sources
- Action Plan
- Outcome
  - Determination of Output Activity to Meet Outcome
  - Who will conduct the Output Activity?
  - Who will use the Output Activity?
  - Timeline for each Output Activity to Meet
- Outcome Assessment of Funding Plan

**Communications Plan Development Process**
The communications plan development process is a framework designed to be used in order to develop a communications plan which ties into the stakeholder analysis, strategic plan, and business plan. The overall goal of the communications plan is to be prepared for issues before they develop into image problems. Below are the components of a communications plan which can be modified for each organization’s individual needs.

- Executive Summary
- Organization’s Situation
- Objectives of Communications Plan
- Strategy of Development of Communication Activities Sources
- Action Plan
- Outcome
  - Determination of Output Activity to Meet Outcome
  - Who will conduct the Output Activity?
  - Who will use the Output Activity?
  - Timeline for each Output Activity to Meet
- Outcome Assessment of Communications Plan

**Marketing Plan Development Process**
The marketing plan development process is designed as the framework for a professional marketing planner to use in order to develop a marketing plan that ties into the stakeholder analysis, strategic plan, and business plan. The tactical marketing development process is a working plan that evolves as the organization changes. The strategic marketing development process is a long term plan that reviews the strategic marketing objectives of the organization and is designed to be a plan from which the tactical marketing plan follows as the organization changes. Below are the components of the two different plans which can be modified for each organization’s individual needs.
## Tactical Marketing Development Process

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<td><strong>Company Situation</strong></td>
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<td><strong>Environment</strong></td>
<td>Competitive plans, opportunities, threats, laws, regulations</td>
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<td><strong>Target Markets</strong></td>
<td>Who your customers are, where they are, and how much they will buy</td>
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<td><strong>Objectives</strong></td>
<td>Where the firm is going in terms of sales, market share, ROI, distribution,</td>
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<td>technology, and quality</td>
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<td><strong>Strategy</strong></td>
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<td><strong>Action Programs</strong></td>
<td>• Specific activities and tactics, individual assignments, timetables, and</td>
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<td>• Setting performance standards</td>
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<td>• Performance measures used for control purposes</td>
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<td>• Customers, product, distribution, sales and advertising</td>
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<td>• Measuring and analysis of performance analysis between planned &amp; actual</td>
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<tr>
<td></td>
<td>• Establish specific activities &amp; tactics with individual assignments,</td>
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<td>timetables, &amp; completion dates</td>
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<td>• Marketing audit, implementing the marketing audit</td>
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<td><strong>Anticipated Results</strong></td>
<td>Projected profit and loss statement and cash budget by month and quarter,</td>
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<td><strong>Contingency Plans</strong></td>
<td>What to do if sales, profit, and other goals are not met</td>
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</table>
Strategic Marketing Development Process

What is our business?

What will it be?

Determine mission & set of objectives

What should it be?

External Analysis

Customers, Segments, motivations, needs

Assess portions of each business unit

Competition Identity, size, costs, strengths

Internal Analysis

Performance ROI, market shares, product quality, costs, product

Strategic Options, past strategy & problems, organization capabilities, constraints, financial resources

Develop product service strategies for each SBU

Select target market segments

Position product/service relative to other products

Forecast sales & profits for target market segments

Implement Marketing

Review & monitor program

Product lines

Pricing

Promotion

Channels of Distribution

Revise strategies & tactics if forecasts not consistent with objectives