

Strategic Planning Masterclass

For Growing Your Business or
Marketing Department



About Jimmy Newson

Founder: Jimmy Newson Consulting | Moving Forward Small Business.

Senior Advisor | New York Marketing Association

Jimmy Newson is the founder of Moving Forward Small Business, a membership-based digital publishing company on a mission to save a million small businesses from failure by 2050, leveraging technology, innovation, and business strategy. He is also the senior advisor for the New York Marketing Association. He presents workshops and trainings regularly with the NY Public Library, SCORE, Digital Marketing World Forum, DC Start-Up Week, and multiple international SaaS companies.



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FB: @jimmylnewson



KEY THEME FOR EVERYONE



What is a Business Strategy

A **business strategy** outlines the plan of action to achieve the vision and set objectives of an organization and guides the decision-making processes to improve the company's financial stability in a competing market.

Why Strategic Planning?

Strategic planning has become a key activity in driving the success of businesses more so than ever before. Whereas a decade ago some organizations could scrape by without one, increasingly competitive environments leave little space for organizations without strategy to thrive or even survive.

The Three No's

There is no perfect plan.

There is no replacement for
commitment.

There is no over-
communication.



The MFSB Guarantee

If you commit to discussing your goals on a regular basis, your execution will improve.

What We'll Cover In This Workshop

Part 1: Vision, values & focus areas

Part 2: Objectives, projects & tasks

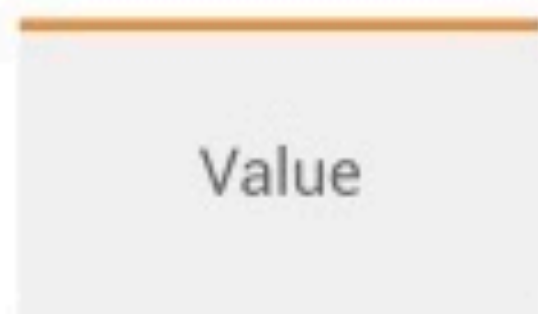
Part 3: KPIs

Part 4: Alignment

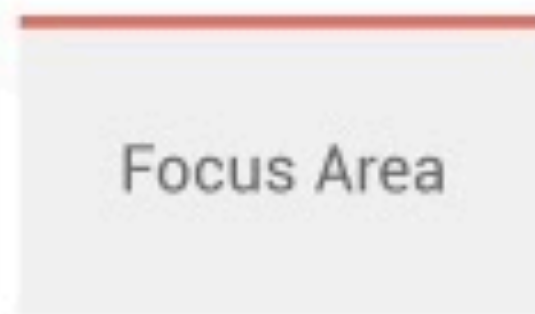
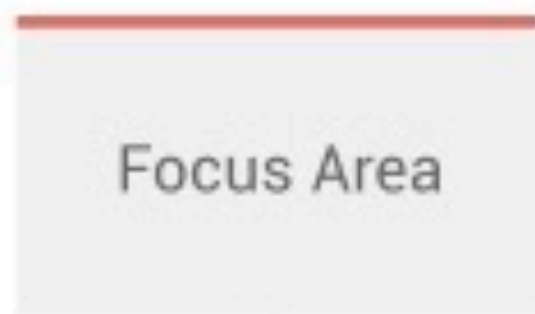
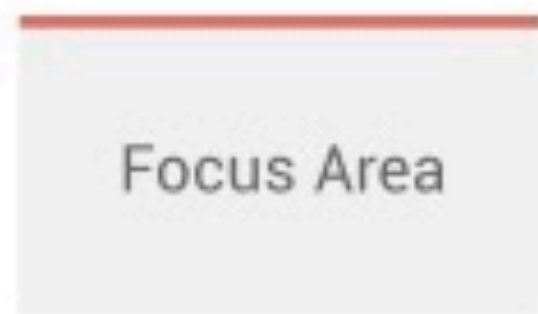
Part 5: Tracking and momentum



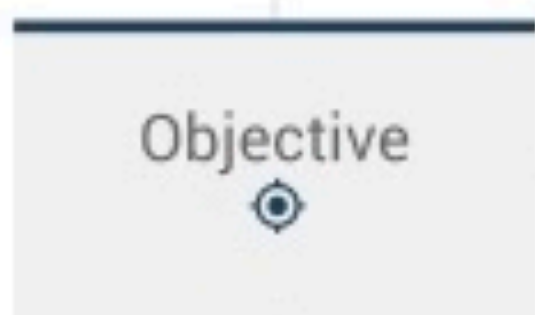
Every significant action in your organization going forward will ultimately be contributing towards this.



Values help unite your organization through a tight set of core beliefs that everyone shares & embraces.

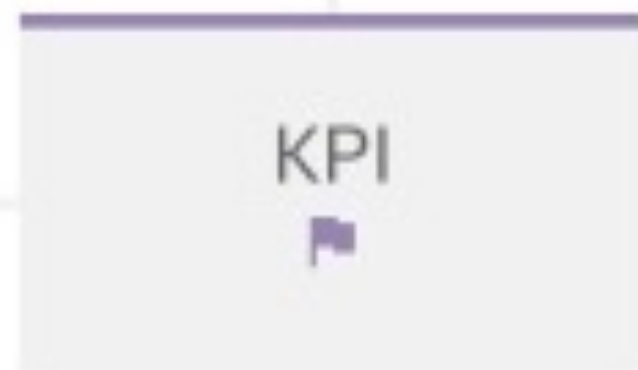


High-level categories that your organization will be focusing on as you strive towards your Vision. They should not have a metric or deadline.

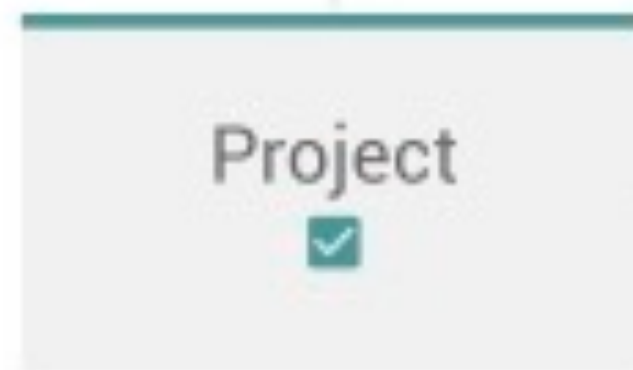


These define what your organization wants to achieve and are more specific than Focus Areas, in that they have a deadline.

 KPI Exception



Numerical measures to help you determine whether or not you're meeting your Objectives.



 Project Update

Specific things you'll deliver to realize your Objectives. They should have clear owners, start and end dates.



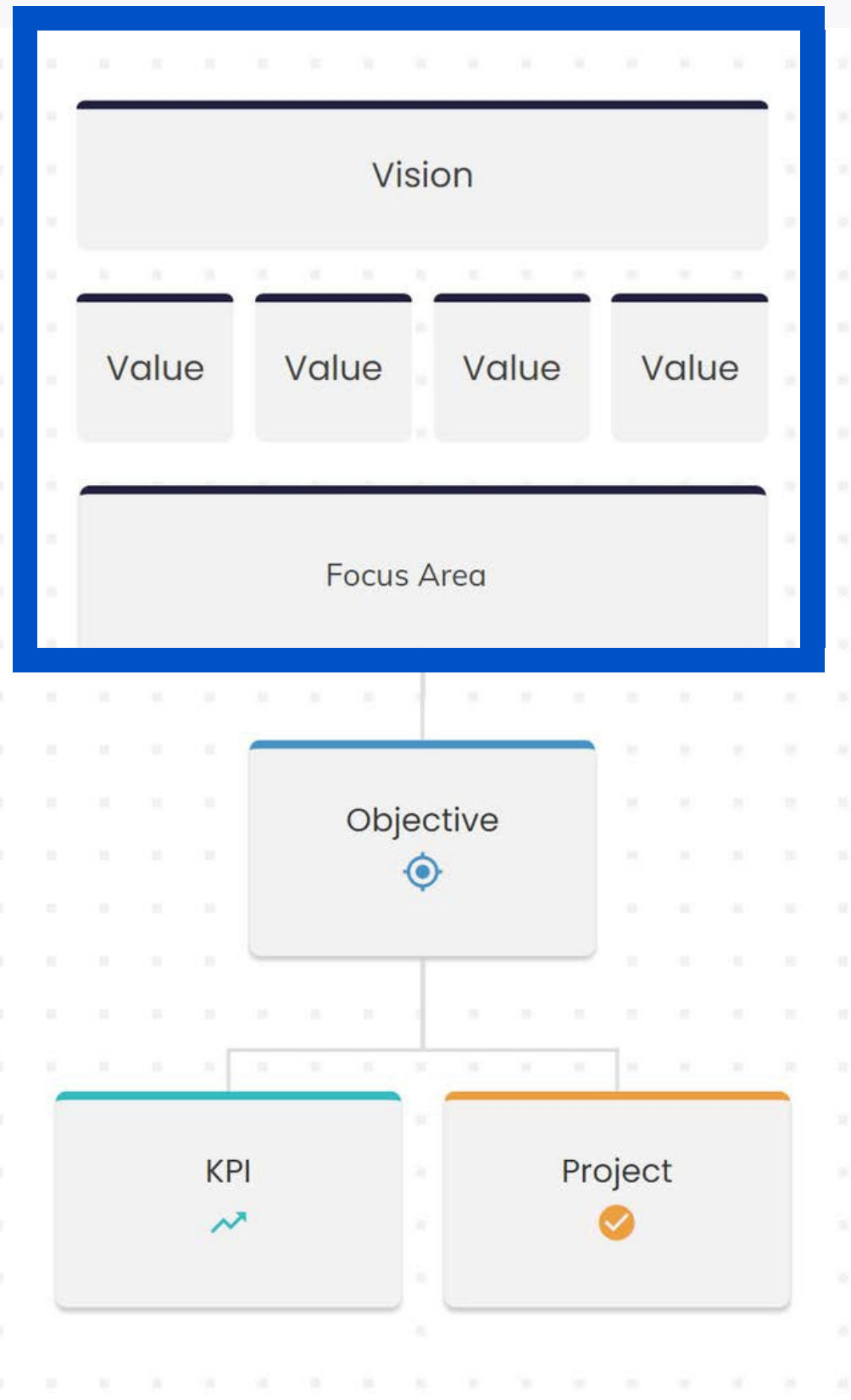
Part 1: Visions, Values and Focus Areas

What Are They?

Vision: Unique, ambitious outcome of your story

Values: The character of your organization

Focus Areas: Categorizing your vision





VISION STATEMENT



What makes a good Vision statement?



- ✓ Two sentences at an absolute maximum
- ✓ Describe a unique outcome that only you can provide
- ✓ Do not use words that are open to interpretation
- ✓ Keep it simple. No technical jargon, no metaphors, etc.
- ✓ Ambitious enough to be exciting but not TOO far away!
- ✓ Align with the company values

Vision: Unique, ambitious outcome of your story

Magic formula!



- 01** What's so special about you?
What value do you deliver?
- 02** You think you're different?
What makes you memorable?
- 03** Are you there yet?
What does success look like?
- 04** What do you see?
Does it paint a clear picture?

Good Vision Statements: Examples



Boeing:

"People working together as a global enterprise for aerospace industry leadership."



Adobe:

"To move the web forward and give web designers and developers the best tools and services in the world."



Harley Davidson:

"To fulfill dreams through the experiences of motorcycling."



COMPANY VALUES



What makes a good Value?



- ✓ Internal vs. external company values
- ✓ Avoid fluffy, vacuous values
- ✓ Should represent behaviors of your best people
- ✓ Must be consistent with your vision statement
- ✓ Can be connected to stories specific to YOU
- ✓ Should come naturally

Values: The character of your organization

Good Company Values: Examples



- ✓ **One customer, one team**
- ✓ **Do what matters, for the customer and for us**
- ✓ **Listen curiously, act honestly**
- ✓ **Push forward, even when you step back**

Good Company Values: Brand them!

**One
customer,
one team**



**Do what matters,
for the customer
and for us**



**Listen curiously,
act honestly**



**Push forward,
even when you
step back**





FOCUS AREAS



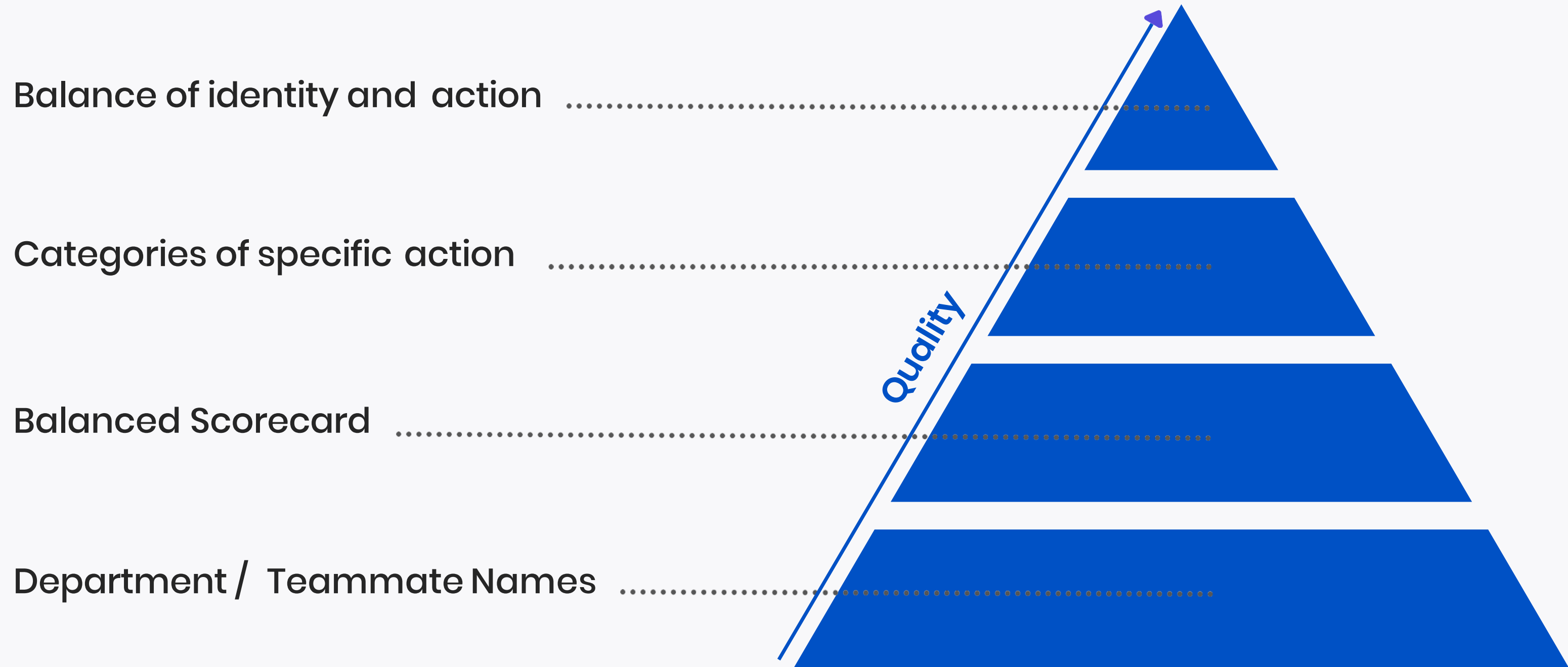
What makes a good Focus Area?



- ✓ Foundation stones of your strategy
- ✓ Expand on your vision with specific categories of effort
- ✓ Easy to remember...for easier FOCUS!
- ✓ No longer than 6 words each
- ✓ Not too broad, no jargon
- ✓ No metrics

Focus Areas: Categorizing your vision

Focus Area Tiers



REMEMBER:
Start with Categories



Good Focus Areas: Examples



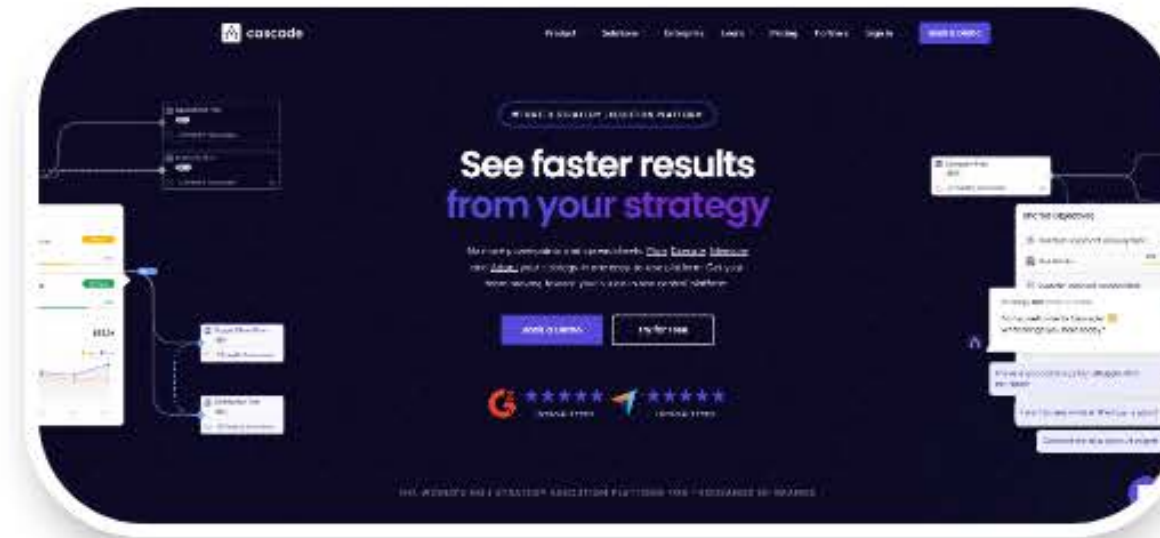
- ✓ **Expand Global Recognition**
- ✓ **Grow Sustainably and Responsibly**
- ✓ **Engage with our Community**
- ✓ **Cultivate a Proud and Happy Team**

Growth Strategy Resources

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Cascade - Strategy Tool



Part 1

Part 2

Part 3

Part 4

Part 5



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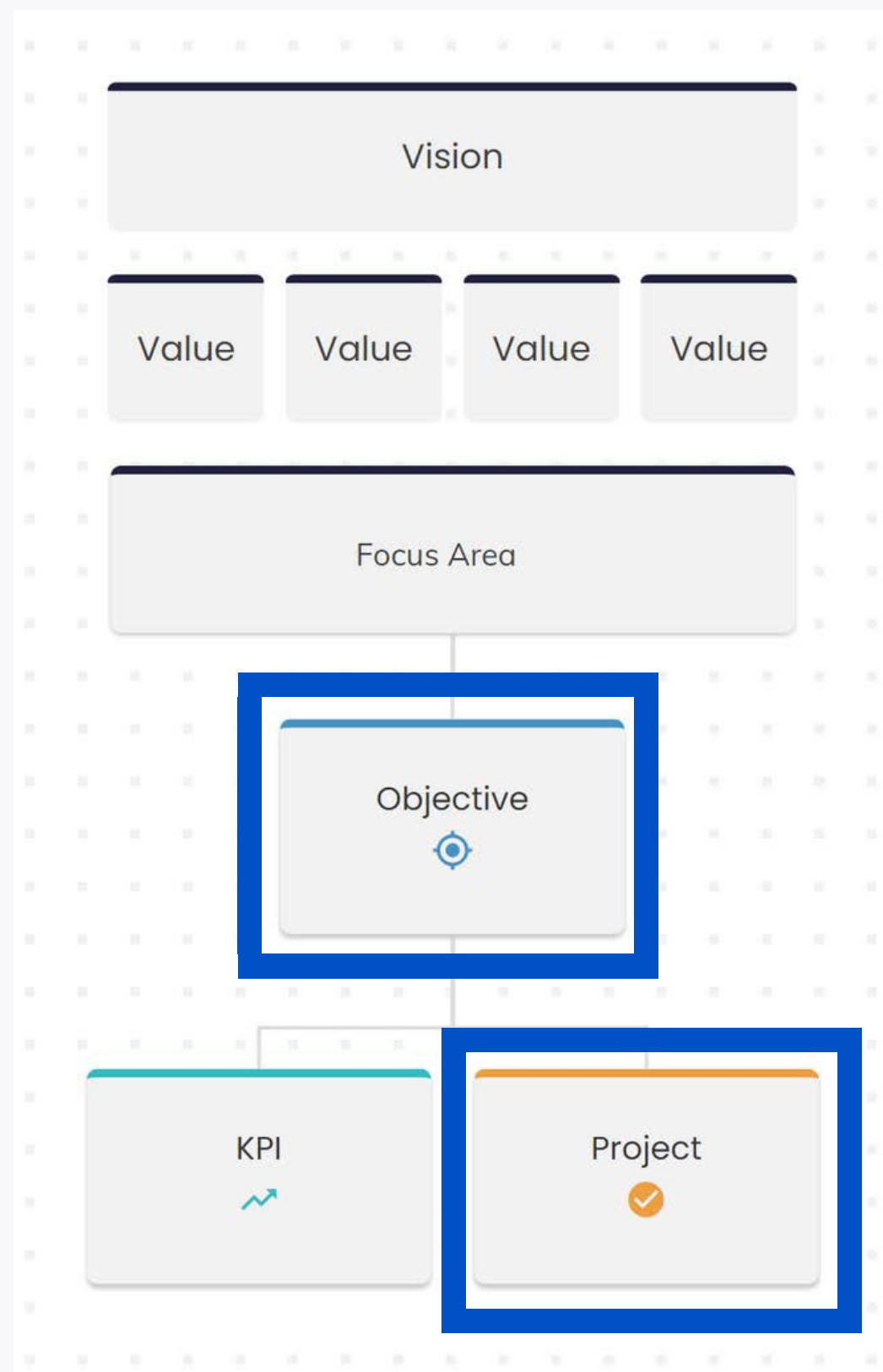
Part 2: Objectives, Projects & Tasks

What are they?

Objective: Qualitative, time-bound outcome

Project: Actions we're taking to get there

Task: Milestones along the way



Strategy Execution Tips



- **Involve your people early: get insights and buy-in**
- **Let objectives reinforce the "Why" behind existing strategic projects**
- **Don't be afraid to iterate***
 - (remember, no perfect plans)

*We recommend weekly touch-bases and monthly in-depth strategy reviews at minimum.



OBJECTIVES



What makes a good Objective?



- ✓ High-level statement describing a specific outcome
- ✓ Always has a deadline attached, even if it's just the full year
- ✓ Can be tangibly achieved; linked to org identity
- ✓ Should be attached to your Focus Areas (ideally one each)
- ✓ NO SPECIFIC METRICS (those come later)

"If I was meeting with my investors / board, what would be the key objectives that I would update them on if I only had an hour?"

Magic formula!



01 How many should we have?
Ideally 3-6 per Focus Area MAX

02 Simple, single sentence.
Easy to describe to anyone.

03 SMART goal structure:
Action + Detail + Deadline

04 Specific accountability
Two owners MAX, w/primary owner*

*Will be more diverse ownership in delivery items / more granular tracking

Good Objectives: Examples



- ✓ Triple our revenue across key segments by DATE
- ✓ Achieve brand recognition across the region by DATE
- ✓ Set the industry standard for quality by DATE
- ✓ Create a workplace where team members love their jobs and want to stay by DATE
- ✓ Have a net positive impact on the environment by DATE

Objective: Qualitative, time-bound outcome



PROJECTS & TASKS



What makes a good Project?



- ✓ What you'll do to achieve your objectives
- ✓ Specific actions you will take to get there
- ✓ Do NOT list operational things ("Keep the lights on" stuff)
- ✓ Can be broken down into sub-projects or tasks/milestones
- ✓ Tasks/Milestones are **done or not done** - keep it simple

"Given that we have these key objectives, **HOW** are we going to get there?"

Magic formula!



- 01** Is this independent of strategy?
Make it strategic, or don't include it.
- 02** Why would we do this?
Should be an Objective to lean on.
- 03** Do we have clear accountability?
Identify the team, then person ASAP.
- 04** Can we break it down into tasks?
Need a clear path forward.

Good Projects: Examples



- ✓ Expand into the fixed gear market by DATE
- ✓ Create a large-scale marketing campaign by DATE Audit
- ✓ all current quality-control processes by DATE
- ✓ Conduct a company-wide survey to gauge engagement and happiness by DATE
- ✓ Switch over to more sustainable raw materials by DATE

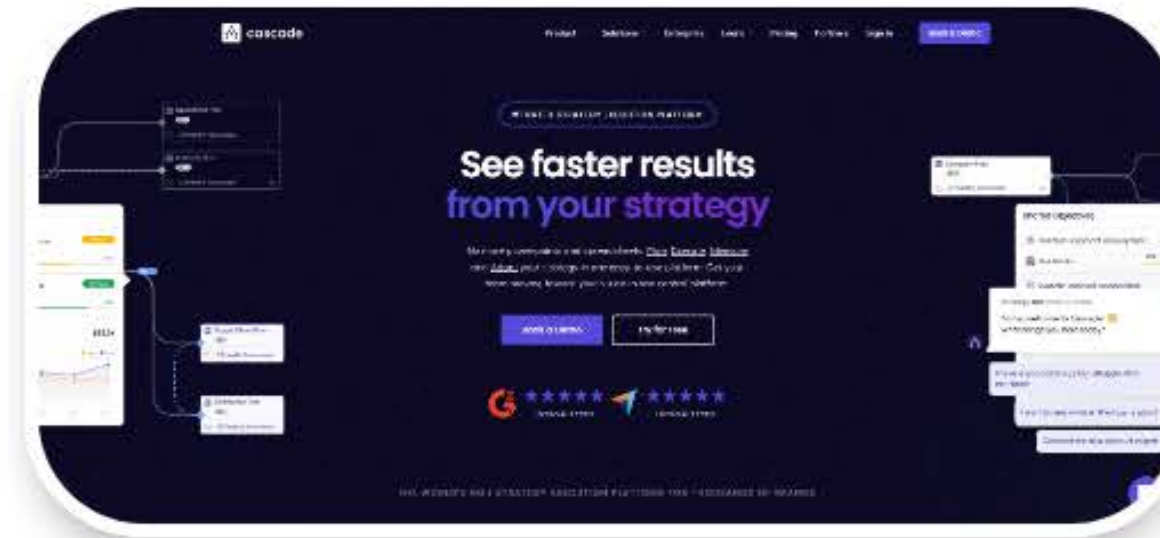
Project: Actions we're taking to get there (with tasks/milestones along the way)

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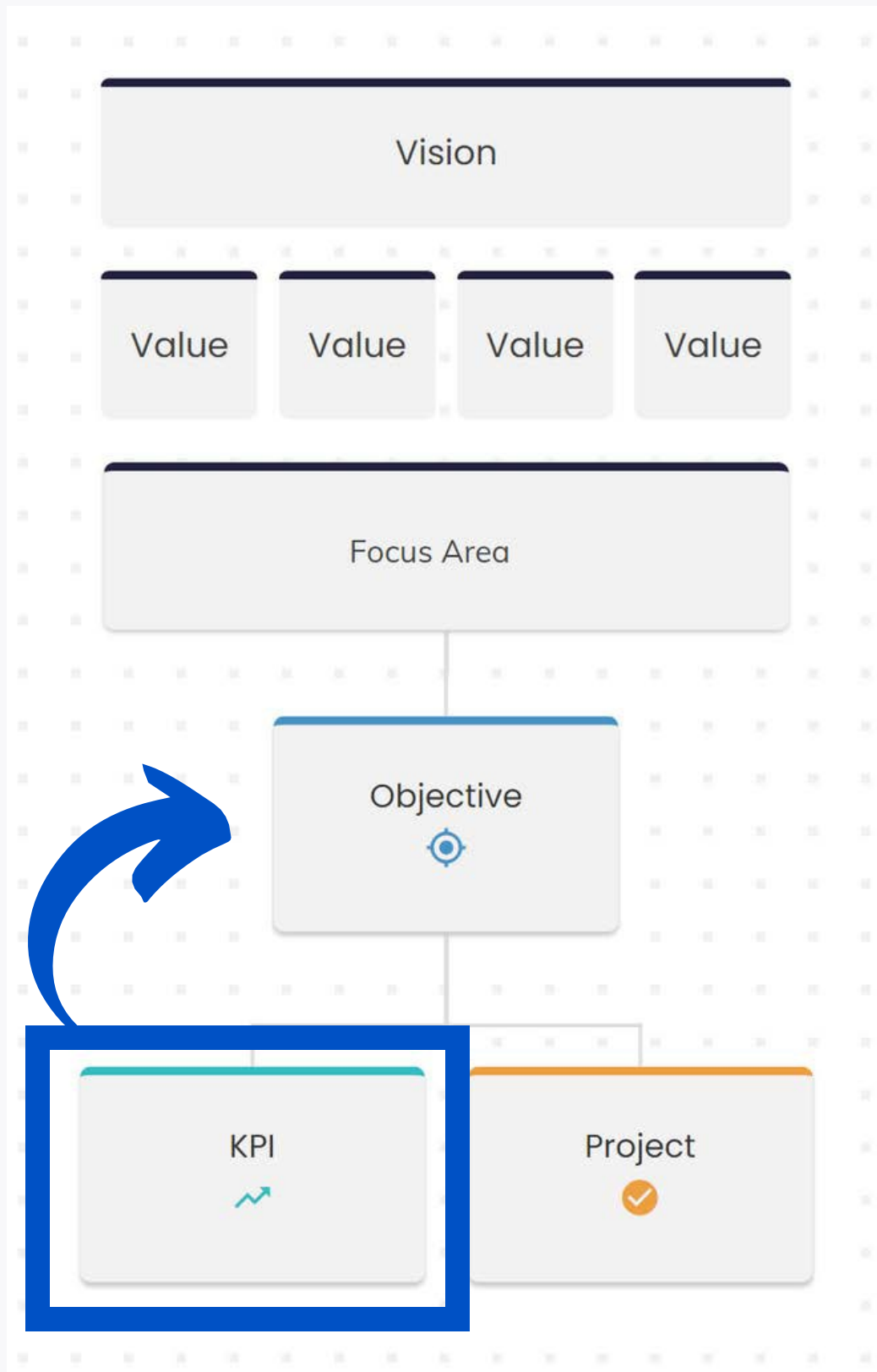


Part 3: All About KPIs

What are they?

KPI (Key Performance Indicator):

Measurable value that shows progress toward achieving key objectives



Strategy Execution Tips



- **Have clear leading indicators that drive lagging indicators**
- **Don't overload your team with lagging indicators (dilutes focus)**
- **Don't be afraid to iterate***
 - (remember, no perfect plans)
 - BUT...give your team time to learn when it comes to KPIs
 - Separate the "DO" from the "YOU"

*We recommend weekly touch-bases and monthly in-depth strategy reviews at minimum.



KPIs

(Key Performance Indicators)



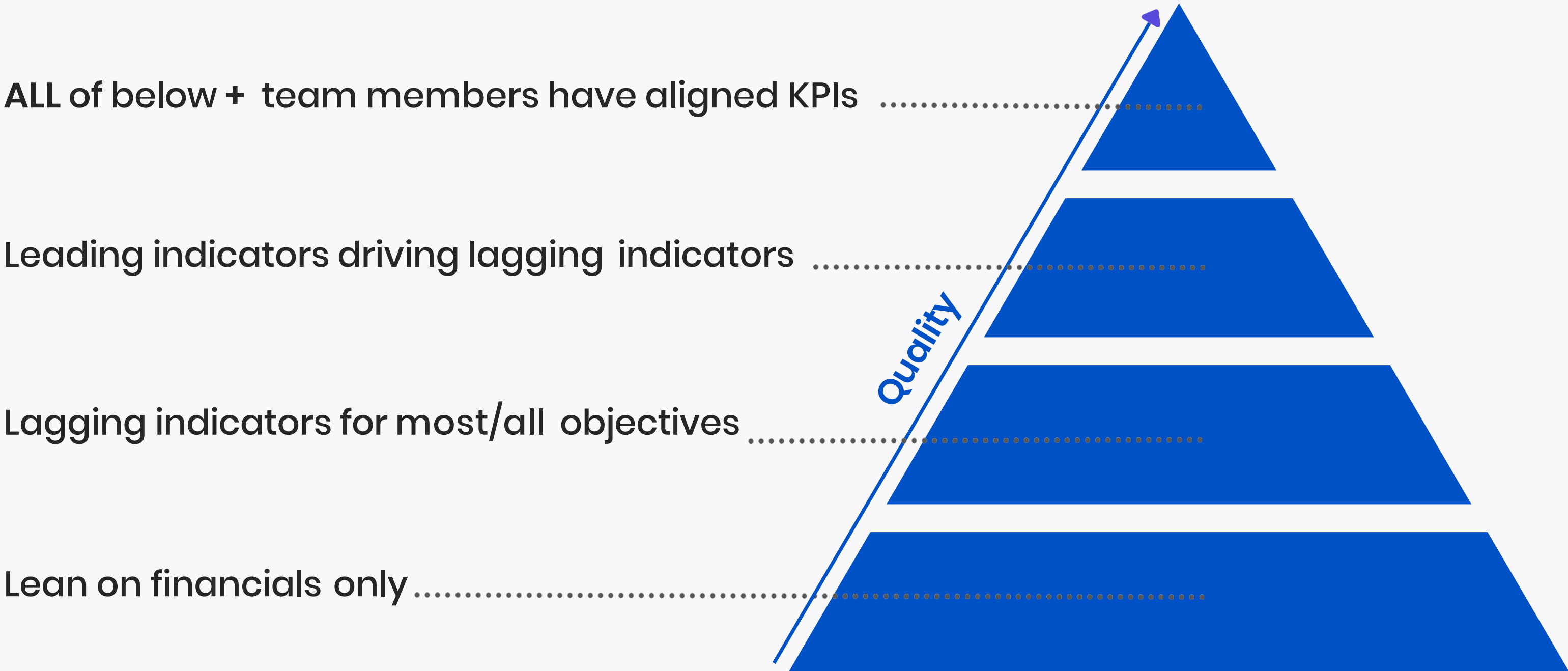
What makes a good KPI?



- ✓ ALWAYS QUANTITATIVE, time-bound measure
- ✓ DEFINE SUCCESS for corresponding objectives
- ✓ Together, they act as a **scorecard** for company health
- ✓ Help to identify when to make adjustments
- ✓ Recognize and analyze patterns/trends
- ✓ **Did I mention these need to be measurable?**

Tip: Don't copy your KPIs straight from someone else's list!

Tiers of Scorecard Quality*



*Scorecard meaning your mix of KPIs / metrics

Disclaimer:

**Wherever your KPIs are today,
they will be more thoughtful a
month from now.**

Just keep discussing and tracking them!

Magic formula!



01 Determine your objectives

We already did this!

02 Define success

The "by how much" part comes next

03 Decide on measurement

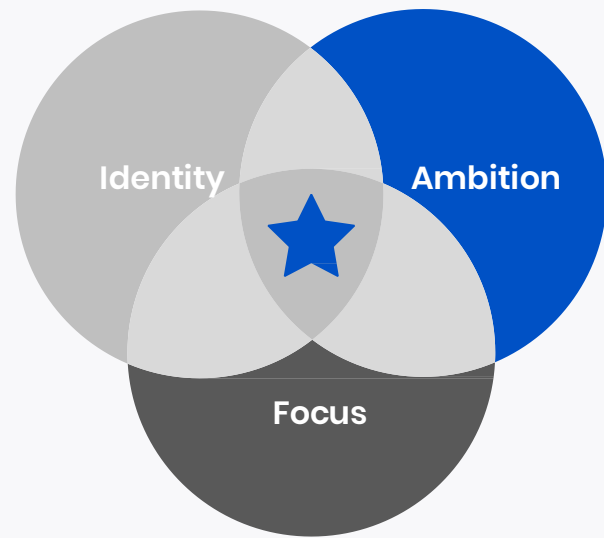
This is where the homework comes in

04 Write your KPIs (SMART format)

Action + Detail + Value + Deadline*

*Explicitly call out the unit of measure in here as well

Good KPIs: Examples



- ✓ Triple our revenue across key segments by DATE
 - Increase revenue to **\$65,000,000** by DATE
- ✓ Achieve brand recognition across the region by DATE
 - Increase brand awareness to **50%** based on surveys by DATE
- ✓ Set the industry standard for quality by DATE
 - Have no more than **10 incidents** reported by DATE

KPI: Measurable value that shows progress toward achieving key objectives

Good KPIs: More Examples



Create a workplace where team members love their jobs and want to stay by DATE

- ✓ • Achieve average satisfaction rating of 4.5 stars by DATE

Have a net positive impact on the environment by DATE

- ✓ • Reduce estimated carbon emissions 33% (no more than 4400 total lbs of CO₂) by DATE

KPI: Measurable value that shows progress toward achieving key objectives

Once you **HAVE KPIs...**



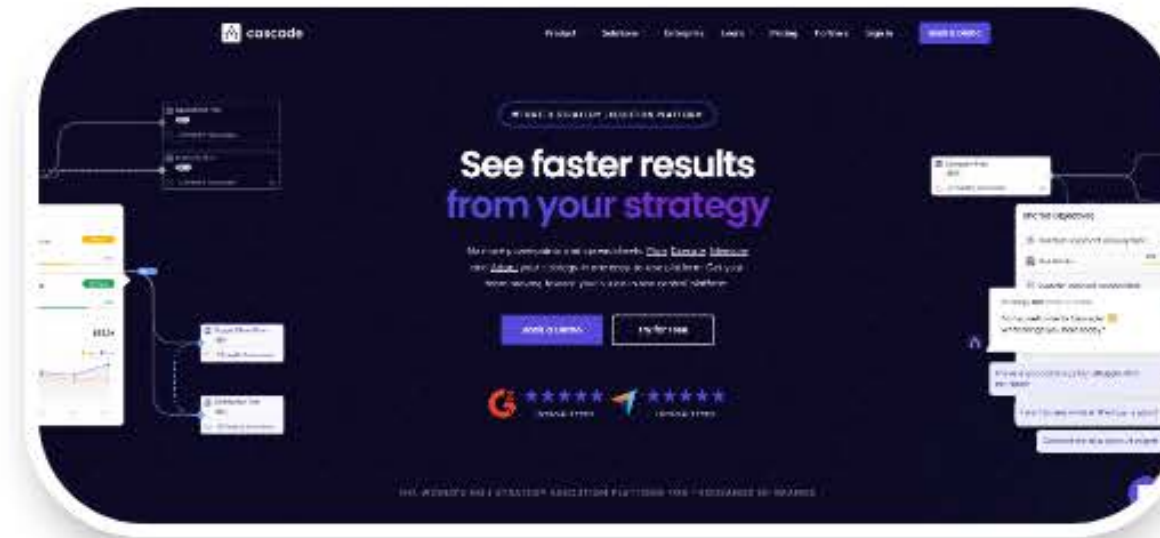
- Carefully review weekly, discuss as a group monthly at minimum to scale focus.
- Pay close attention to actions taken vs. end result to scale awareness.
- NEVER lose sight of current leading indicators, and look out for new ones!

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Part 3

Part 4

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Part 4: Alignment (the secret sauce)

Alignment, you say?

"Our new strategy is bold, full of awesome ideas and ready to be rolled out."

"I make sure to spend at least one hour a week on strategy. The rest of the time I'm just focused on BAU."



"It was a solid plan, but we struggled to get traction."

"Can someone send me that PowerPoint with the strategy from back in January? I need to update my goals in WorkDay."

"I asked our VPs and they promised me that their people and projects are 100% aligned to the plan. So, that's good i guess?"

"By launch the strategy, you mean send out the slides right?"

"Strategy took a back seat when COVID hit..."

"Our engineers use Jira, Marketing uses Trello, Sales live in Excel & the CEO thinks PowerPoint is cutting edge. So yeah, getting a single view of how the business is performing is a piece of cake."

Common Themes

theme

1

Disconnects
across the org

theme

2

Subjective over
objective

theme

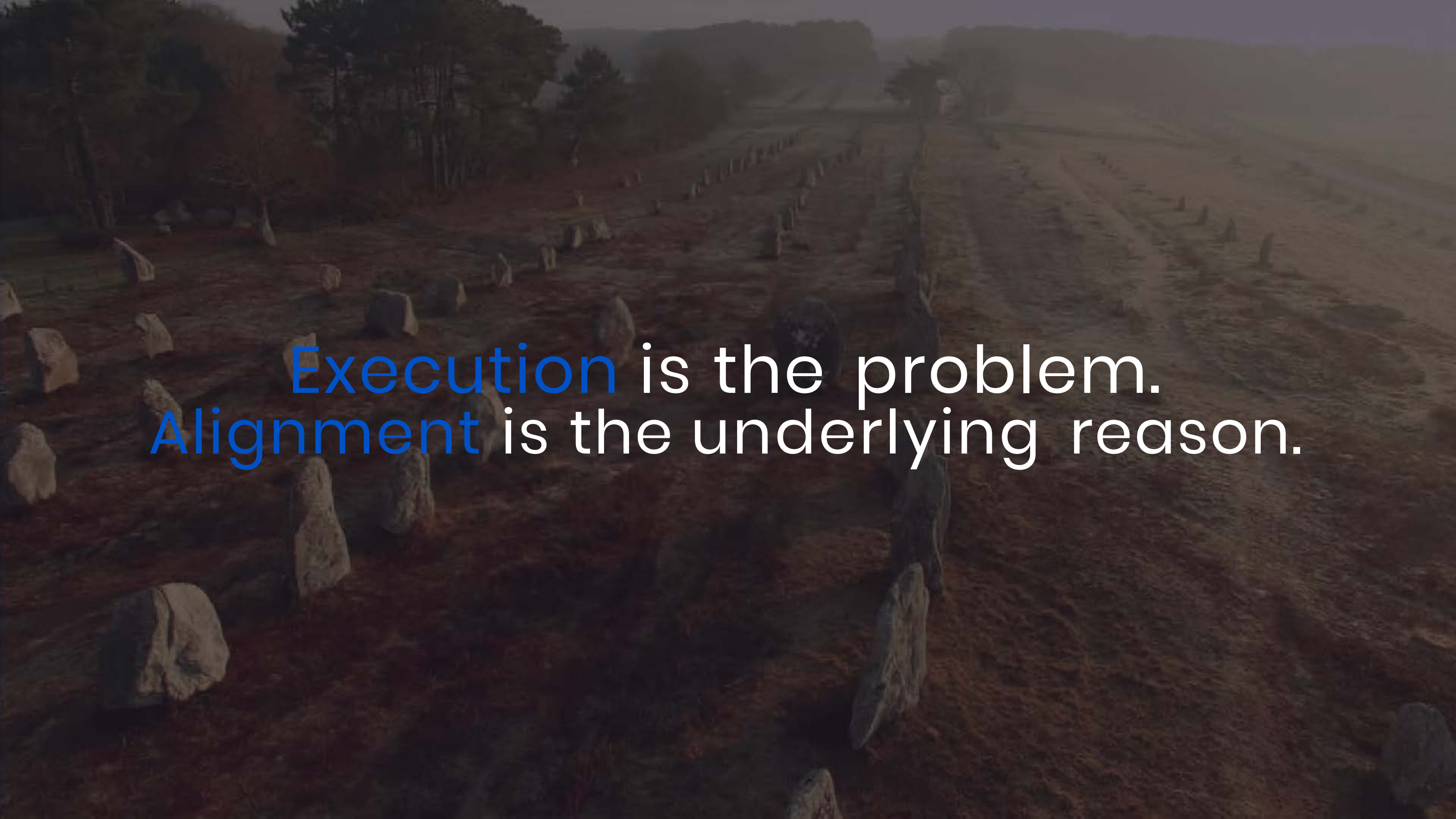
3

Strategy is not
top-of-mind

theme

4

Success is
unclear

A photograph of a stone wall in a misty landscape. The wall is made of large, irregular stones and runs across the middle ground. In the background, there are trees and rolling hills under a hazy sky. The overall tone is muted and atmospheric.

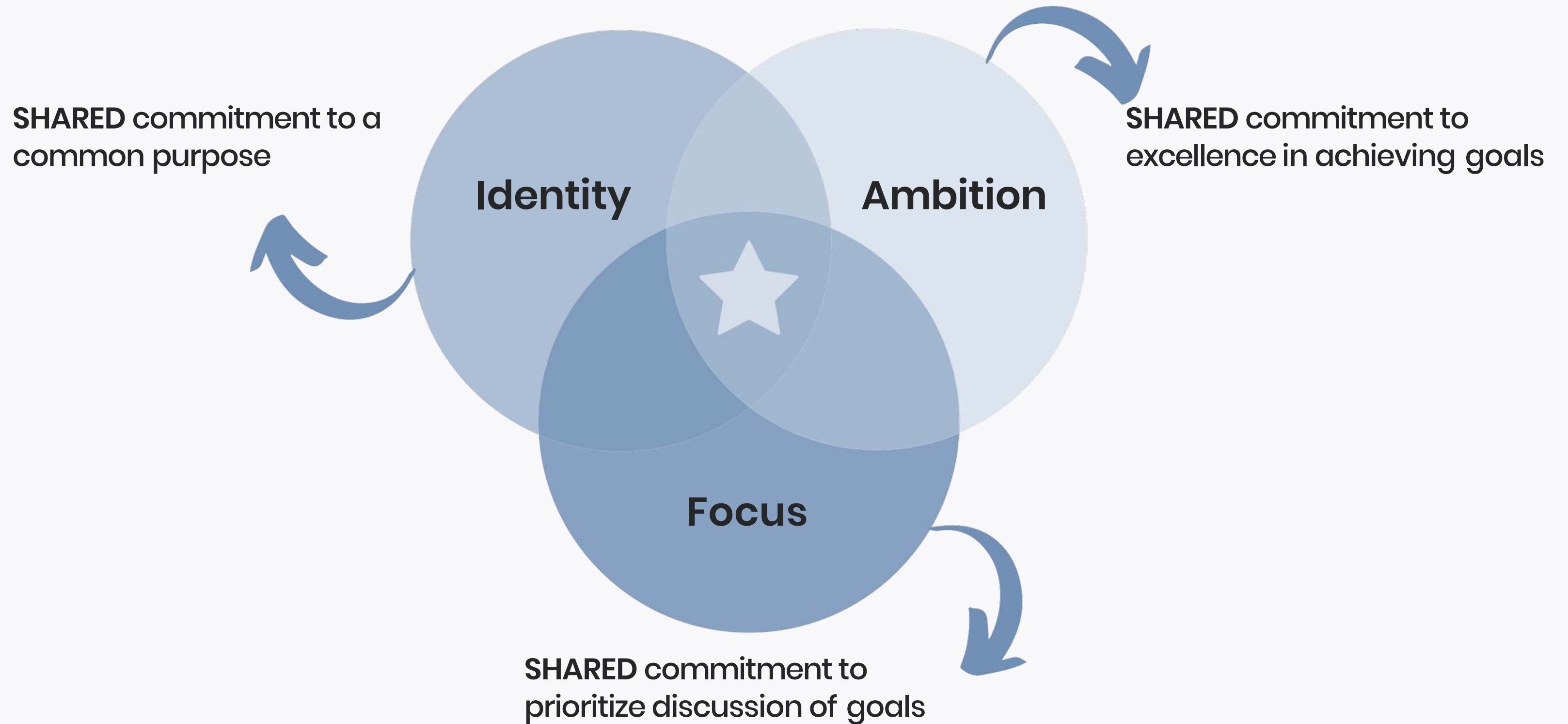
Execution is the problem.
Alignment is the underlying reason.



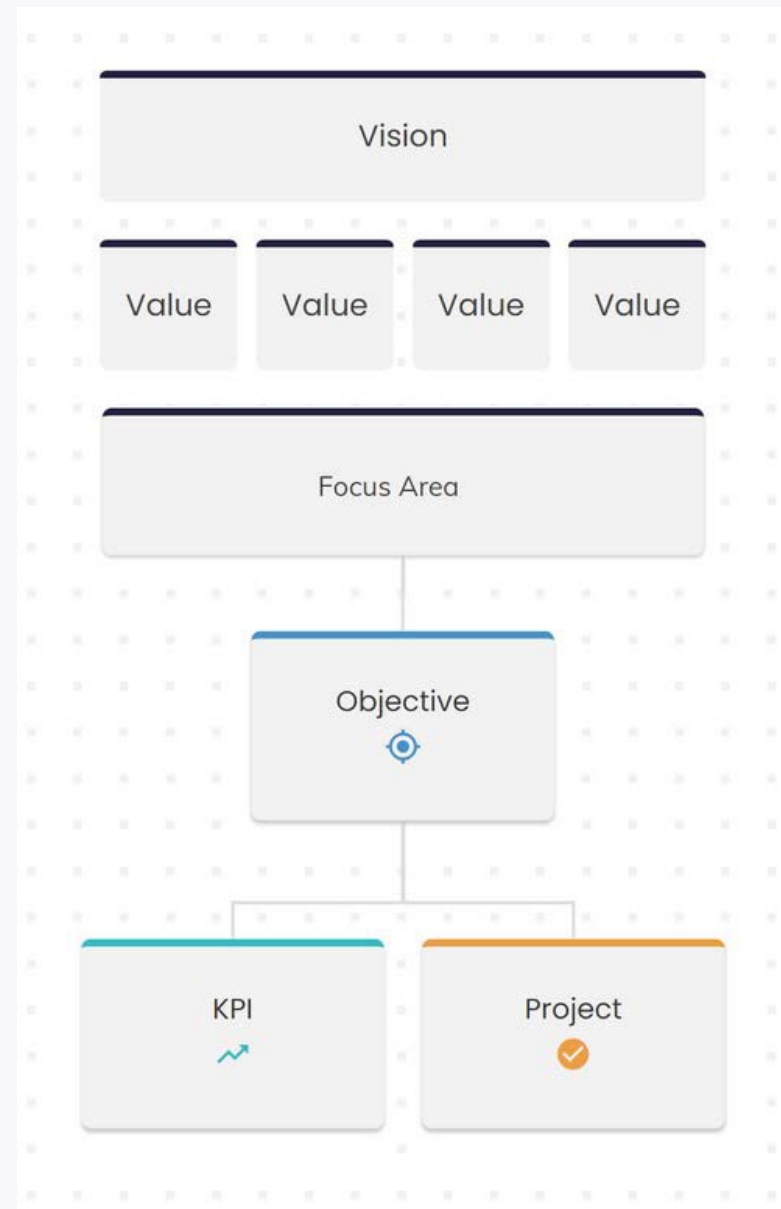
ALIGNMENT

(The "Secret Sauce")

CULTURAL Alignment



TANGIBLE Alignment



How we fit together



How often we discuss,
and with who



How the review looks,
depending on audience

Strategy Execution Tips



- Shorten meetings as needed, but **NEVER** skip.*
- **Lift your people up: Celebrate momentum, address barriers.**
- **Don't show and tell.**
 - No need to discuss every single thing every time.
 - Look for collaboration opportunity.
 - Walk away with next steps.

*We recommend weekly touch-bases and monthly in-depth strategy reviews at minimum.

What makes good alignment?



- ✓ Culture of transparency and FOCUS
- ✓ Clear direction from leadership
- ✓ CONSISTENCY in celebrating the good, sharing the bad
- ✓ Clear purpose for EVERY recurring meeting
- ✓ Connecting performance to the strategy
- ✓ COMMITMENT ALL AROUND!

Remember that guarantee? :)

Magic formula!



01 Determine all stakeholders

Name every possible group.

02 Define stakeholder roles

What is their relationship to the plan?

03 Evangelize your "Why"

Scale clear, effective messaging.

04 Define venues and format

Who, what, and why of meetings!*

*The frequency, specific attendees, visuals to leverage, and clear purpose of the meetings will become your **RULES OF ENGAGEMENT!**

Identify Stakeholders:

Who	Role	What	Impact*
Shareholders	Concerned about financials, cash flow, strategic direction	Drive accountability for leadership team	Rewards / justifies investment
Senior Leadership	Deliver on key KPIs	Must keep entire company aligned and focused together	Employment, seeing visions to reality
Employees	Carry out day-to-day responsibilities	Deliver on key outputs / individual KPIs	Clarity in purpose, greater motivation, opportunity

*How does the success of the strategy impact them?

Evangelize your "Why"



- Paint a picture of the future: Why this matters to YOU!
- Vision Statement+
- Detailed, personal messaging from CEO / leadership
- Reiterated in key meetings

Define Venues

Meeting	Frequency	Attendees	Purpose
Stand-ups	Daily	Individual teams	Brief chat for escalation, key items happening
Strategy Reviews	Weekly	Departments	Highlight successes, challenges, next steps
Business Reviews	Monthly	Leadership	Gauge strategic direction, consider pivots, financials

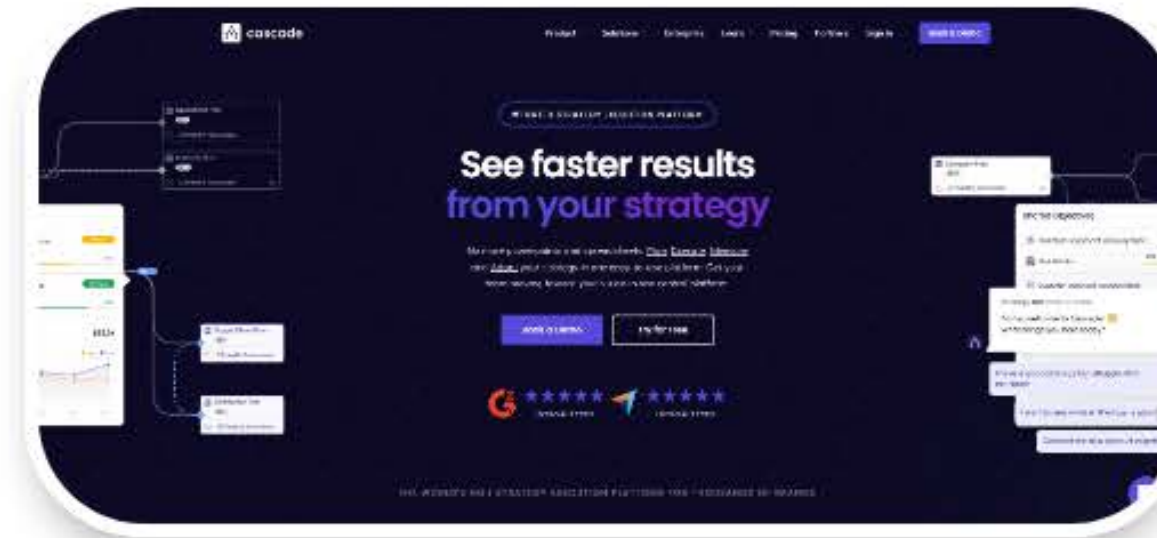
Maybe quarterly board meetings as well.

Growth Strategy Resources

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Part 1

Part 2

Part 3

Part 4

Part 5

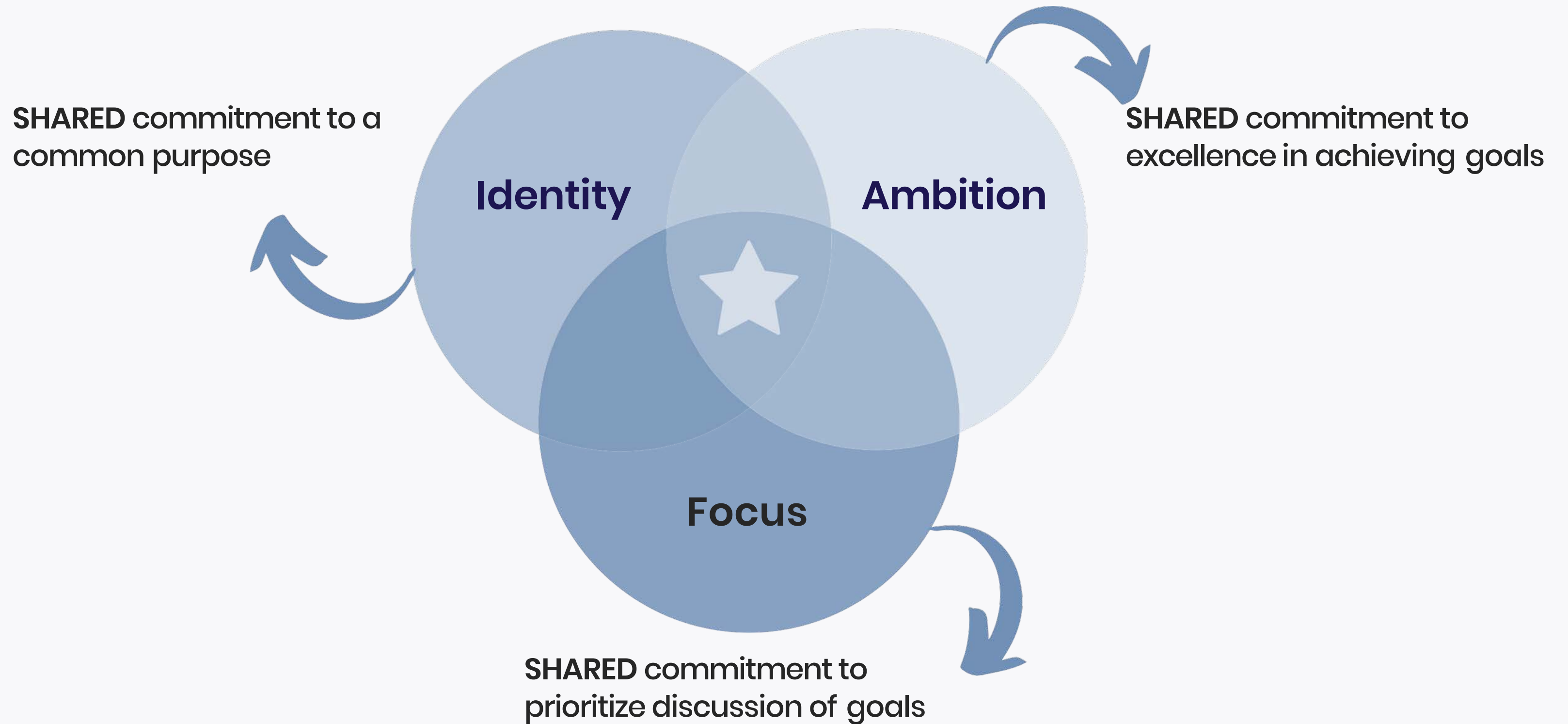


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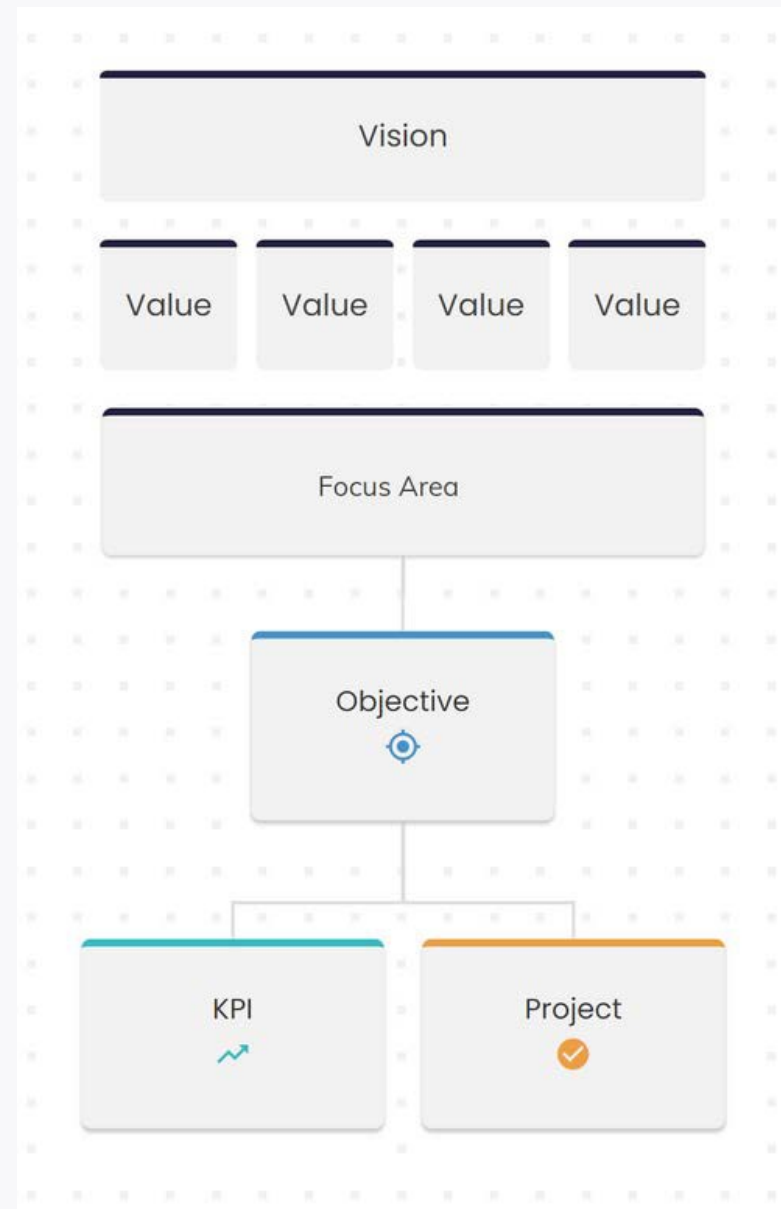
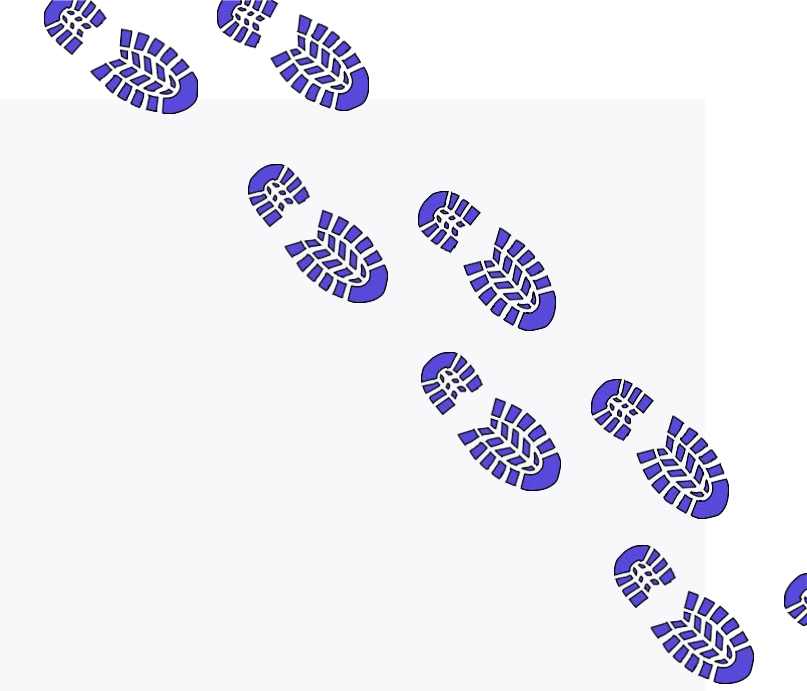


Part 5: Tracking and Momentum

CULTURAL Alignment



TANGIBLE Alignment



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Shorten meetings as needed, but NEVER skip.



ALIGNMENT = MOMENTUM

Don't waste it!



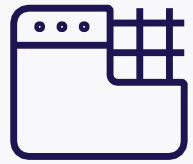
Strategy Execution Tips



- **Complement basic meeting schedule with rules of engagement for goals.***
- **Prepare your people for inevitable challenges w/change management.**
- **Emphasize ongoing learning, and demonstrate success with early adopters.**

*How will we handle escalations? When is it okay to add/adjust/remove goals, given constraints?

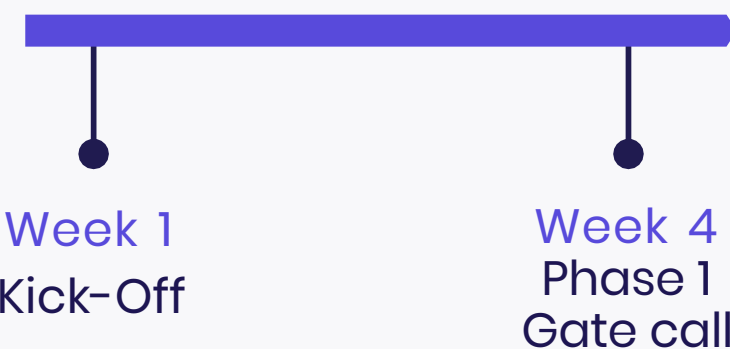
Organize, Engage, Commit, Transform!



Foundation

Weeks 1-4

Platform access, org chart & plan upload, KPI mapping, alignment, foundation reporting & internal communication.



Launch

Weeks 5-8

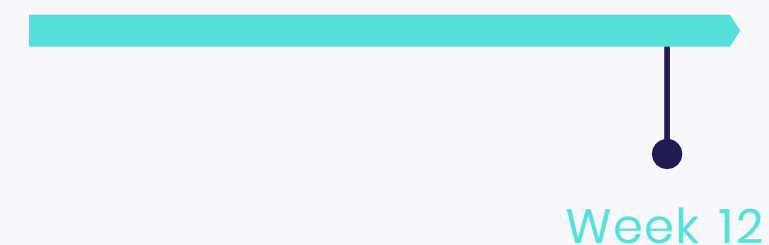
Employee onboarding, engagement reviews, feedback collection, further planning, alignment & health assessment



Strategy tracking

Weeks 9-12

QBR to report on business results, key learning, board & leadership updates & adjustments



Scale & Results

Months 4+

Successful rollout & team adoption, perceived value & tangible outcomes



What makes for productive tracking?



- ✓ Culture of transparency and FOCUS*
- ✓ Clear direction from leadership*
- ✓ CONSISTENCY in celebrating the good, sharing the bad*
- ✓ Clear visuals that lead with objective, lean on subjective
- ✓ Ensure accessibility for all stakeholders
- ✓ ACCOUNTABILITY without FINGER POINTING

*Look familiar?

Magic formula!



*For weekly meetings, this could be basic tasks. For monthly meetings, this could include more in-depth escalation. Regardless, ensure these next steps are addressed in the next meeting at the latest!

01 Have accessible systems in place
Give Cascade a try! Need good data.

02 Document and share expectations
Collateral + information "hubs" help!

03 Prepare updates BEFORE meeting
Should know where they'll "flow" to.

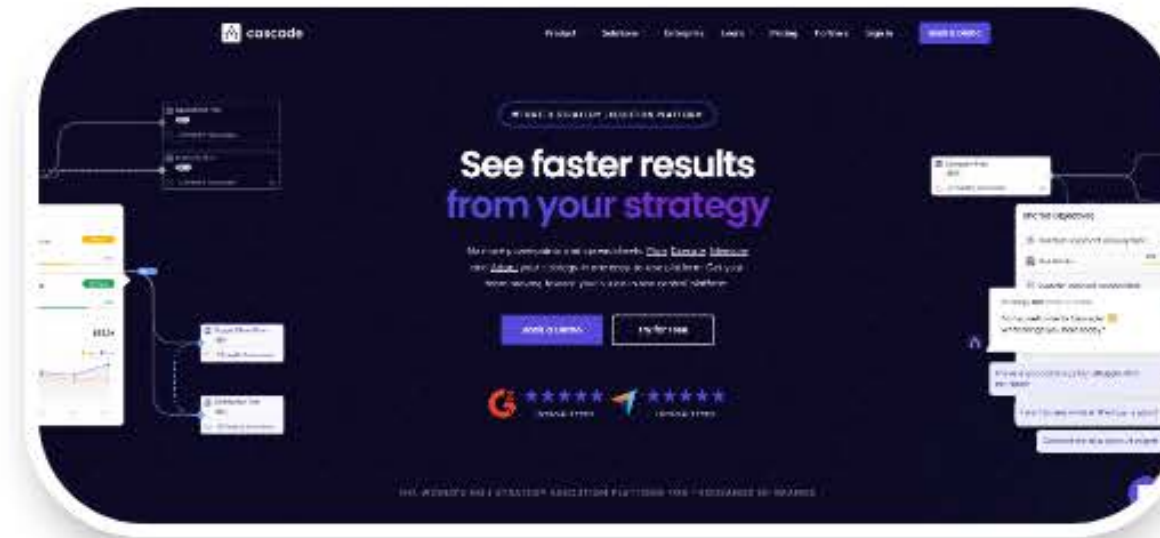
04 ALWAYS walk away with next steps
Reinforce basic accountability.*

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Part 1

Part 2

Part 3

Part 4

Part 5



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BONUS: TIME BLOCKING

BLOCKING

			MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	Saturday	Sunday
EMAIL	Schedule when you will review your email 2 - 3 times/week		Planning	Prospecting	Sales Calls	Proposals	Internal Meetings		
PROSPECTING	Time dedicated to prospect research to keep your pipeline full 3 X 90 minutes per week	6:00 AM						OPEN	OFF ALL DAY
		6:30 AM	EXERCISE	EXERCISE	EXERCISE	EXERCISE	EXERCISE		
DISCOVERY	Time dedicated for discovery calls, 3 X 90 minutes per week	7:00 AM	MIT	MIT	MIT	MIT	MIT		
		7:30 AM	MIT	MIT	MIT	MIT	MIT		
		8:00 AM	MIT	MIT	MIT	MIT	MIT		
OUTREACH	Time dedicated for email outreach, follow up calls and cold calling.	8:30 AM	Email	Email	Email	Email	Email		
		9:00 AM	BUSINESS PLAN REVIEW	PROSPECTING	SALES	DISCOVERY	TEAM MEETINGS		
TEAM MEETINGS	Schedule time available for your team to put meetings on the calendar.	9:30 AM							
		10:00 AM							
		10:30 AM							
		11:00 AM	PROGRAMMING	OUTREACH	MEMBERSHIP	MEMBERSHIP	PLAN		
SALES	Schedule time each week to schedule sales meeting, where you are actively presenting proposals to prospects.	11:30 AM							
		12:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch		
		12:30 PM	Email	Email	Email	Email	Email		
BUFFER	Things come up and you need time between tasks, so put buffer in your calendar. Length = 90mins/ Min 2x a week	1:00 PM	BUFFER	PROSPECTING	SALES	DISCOVERY	TEAM MEETINGS		
		1:30 PM							
		2:00 PM							
PLAN	Your weekly review and planning session to set up next week and customize the calendar. Length = 60-90 minutes, on Friday	2:30 PM	FINANCES	OUTREACH	PROGRAMMING	SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
		3:00 PM				SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
		3:30 PM				SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
SPONSORSHIP PROPOSALS	Schedule time to create, update and customize proposal for prospects.	4:00 PM				SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
		4:30 PM	CLIENTS	BUFFER	BUFFER	SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
		5:00 PM				SPONSORSHIP PROPOSALS	UNIMARKET PROPOSALS		
MOST IMPORTANT TASKS	Tasks based on your OKR planner = 2 X 90 minutes	5:30 PM	Walk	Walk	Walk	Walk	Walk		
		6:00 PM	Dinner	Dinner	Dinner	Dinner	Dinner		
TRANSFER TO A DIGITAL CALENDAR		6:30 PM	Email	Email	Email	Email	Email		
		7:00 PM	Training/Learning		Training/Learning	Training/Learning			
CUSTOMIZE EACH WEEK		7:30 PM	Training/Learning	BUFFER	Training/Learning	Training/Learning	BUFFER		
		8:00 PM	Training/Learning		Training/Learning	Training/Learning			
PLAN THE DETAILS		8:30 PM	Open	Open	Open	Open	Open		
		9:00 PM	Open	Open	Open	Open	Open		
		9:30 PM	Open	Open	Open	Open	Open		
		10:00 PM	Open	Open	Open	Open	Open		

PROSPECTING, OUTREACH, DISCOVERY, ETC MAINLY FOCUSES ON SPONSORSHIP BUT INCLUDES PROGRAMMING & PARTNERSHIPS WHICH INCLUDES UNIMARKET AND GROWTH ACCELERATOR.

Want help with your growth-based business strategy?

Multiple options available.



jimmy@movingforwardsmallbusiness.com

Three Options Available

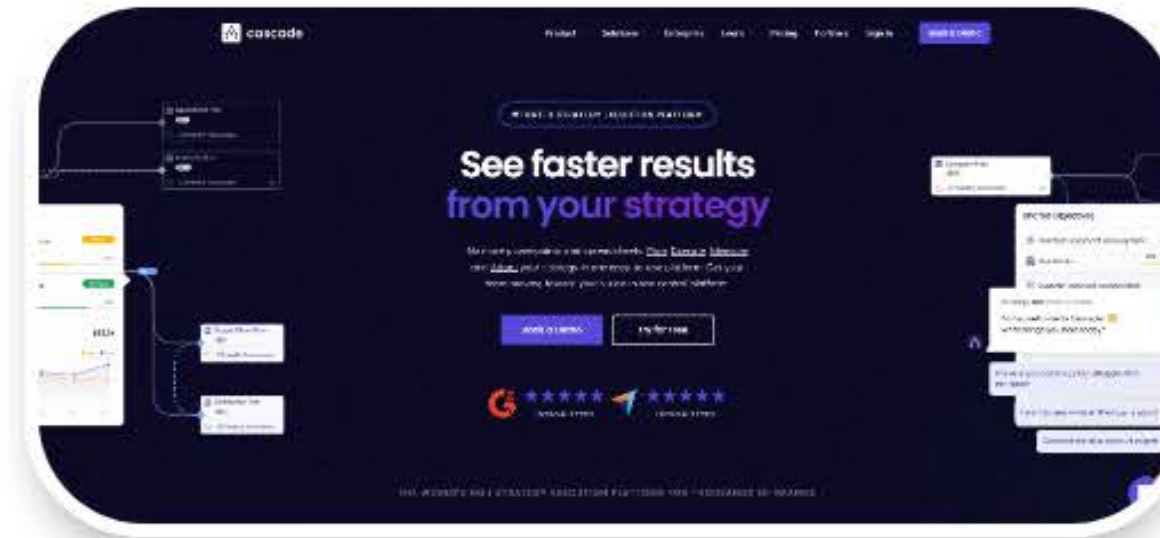
1. 2-month Growth Accelerator - FREE
2. 6-month Group Coaching Program
3. 6-12 month One-on-one Coaching and Consulting

Growth Strategy Resources

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Jimmy Newson

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