

# Overall Plan Strategic Planning & Management Worksheet



by  
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# I. Purpose


What is your vision, your reason for being, your mission, why you are needed; needs met in the community; scope of endeavor: nationwide, local; social responsibility; profit or nonprofit?



## II. Environmental Analysis



- A. What is the direction of your industry, your SIC code?
- B. Who are your primary competitors?
- C. What are international, national, and local statistics as they relate to your business; interest ratios, unemployment, etc?
- D. Who are your primary customers?



# III. Strengths & Weaknesses

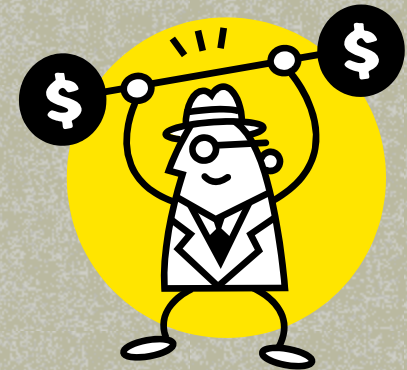
A. Human Resources/People

B. Facilities/Equipment

C. Patents/Natural Resources

D. Financial

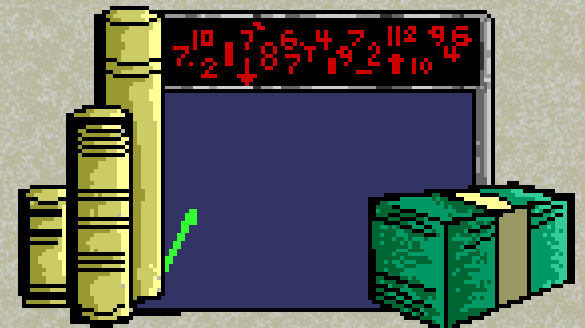
E. Other





# IV. Assumptions

- A. You have no control over
- B. Extend environmental analysis
- C. Usually external
  - 1.
  - 2.
  - 3.





# V. Objectives

Specific, time frame, measurable in key result areas

## Key Result/Objectives/Targets Area

1. Sales/Total Revenue/Size
2. Market Share
3. Return: ROA, ROS, ROI

## Objectives

Last year    This year    Next Year    Five Years



# V. Objectives

Specific, time frame, measurable in key result areas

## Key Result/Objectives/Targets Area

4. Quality/Customer Service
5. Human Resources/People
  - a. Turnover Rate
  - b. Total Work Force
  - c. Training Hours/Employees
  - d. Safety
6. Productivity
7. Public Responsibility/Ethics
8. Other

## Objectives

Last year    This year    Next Year    Five Years



Now, for each key result area, use this form to develop specific objectives, strategies and actions.

Key Result Area

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Objective

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**Strategy to achieve objective:**

1.

2.

3.

**What I have to do to make it happen:**

1.

2.

3.





# VI. Strategy

## (General Overall Strategies)

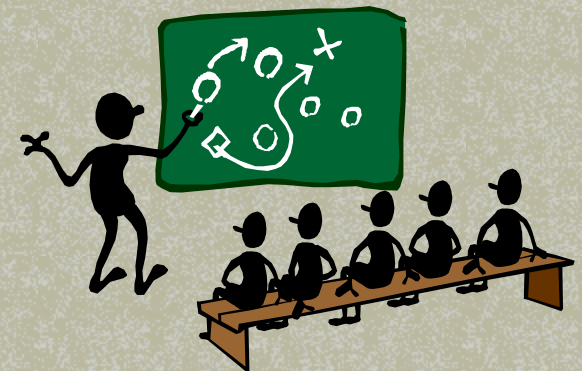
- A. Thinking stage
- B. Where and how to commit resources
- C. Timing
- D. What needs to be done to achieve objectives
  - 1. Sales/Total Revenue
  - 2. Market Share
  - 3. Return: ROA, ROS, ROI
  - 4. Quality/Customer Service



# VI. Strategy

(General Overall Strategies) (cont.)

5. Human Resources/People/Training/  
Morale
6. Some Measure of Efficiency and/or  
Productivity
7. Public/Professional Responsibility
8. Other Key Strategies






# VII. Operational Plan

- A. Getting work accomplished/what must be done in short term
- B. Develop Overall Budget and Support Budgets to accomplish overall plan. How much is needed during operational year to accomplish objectives?

- 1. Overall Budget \$ \_\_\_\_\_
- 2. Marketing Budget \$ \_\_\_\_\_
- 3. Production Budget \$ \_\_\_\_\_
- 4. HR Budget \$ \_\_\_\_\_
- 5. Staff Support Budgets \$ \_\_\_\_\_

- C. Capital Budget is developed and revised yearly



# VIII. Reward/Performance Appraisal

- A. What team and individual review/reward system/bonus/salary is needed
  
- B. Review of performance/schedule overall and support review dates





## IX. Issues/Problems

A. Major

B. Minor

## X. Analysis

A. How do you measure cultures



# XI. Alternative Solutions

## A. List of alternatives

- 1.
- 2.
- 3.

## B. Pros/cons of each – problems/opportunities associated with each

- 1.
- 2.
- 3.

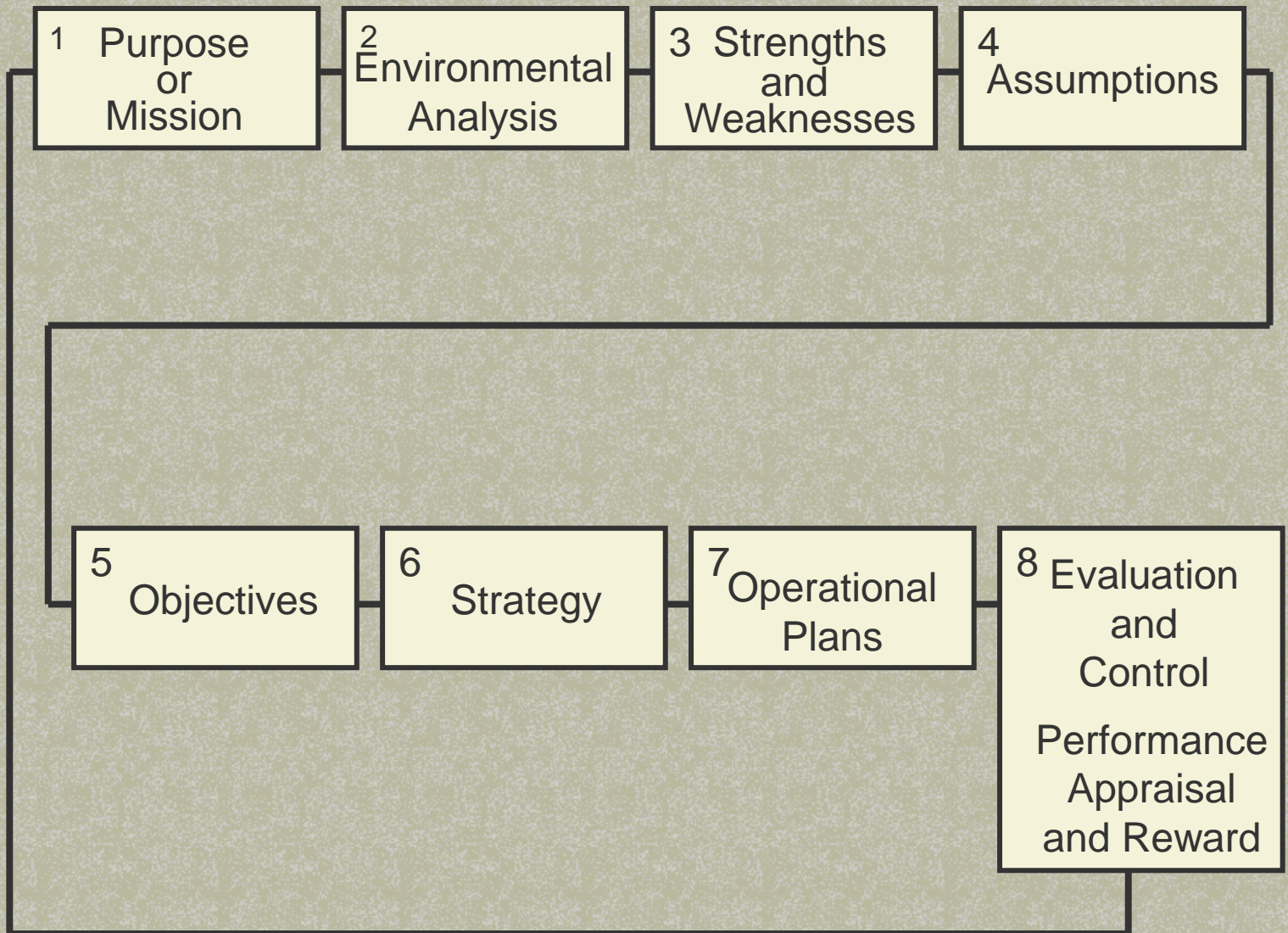


## XII. Recommended Course of Action

- A. Alternative selected and why it was selected
  
- B. Expected benefit of this recommendation
  
- C. What effect will this recommendation have on performance, Income Statement and Balance Sheet



# Strategic Long Range Planning Process





**OVERALL PLAN  
STRATEGIC PLANNING AND MANAGEMENT  
WORKSHEET**

by  
*R. Henry Migliore*

**OUTLINE**

**I. PURPOSE**

- A. What is your vision, your reason for being, your mission, why you are needed, customers served, needs met in community, scope of the endeavor: nationwide, local, accountability, profit or nonprofit?

**II. ENVIRONMENTAL ANALYSIS**

- A. What is the direction of your industry, your SIC Code?
  
- B. Who are your primary competitors?
  
- C. What are international, national, regional, and local statistics as they relate to your business?
  
- D. Who are your primary customers?

**III. STRENGTHS & WEAKNESSES** (usually internal)

A. Human Resources/People

B. Facilities/Equipment

C. Patients/Resources Natural

D. Financial

E. Other

**IV. ASSUMPTIONS**

A. You Have No Control Over

B. Extend Environmental Analysis

C. Usually External

1.

2.

3.

**V. OBJECTIVES AND GOALS**

Specific, time frame, measurable in key result areas

**KEY RESULT/OBJECTIVES/TARGETS**

<b>AREA</b>	<b>OBJECTIVES</b>			
	<b>Last Year</b>	<b>This Year</b>	<b>Next Year</b>	<b>Five Years</b>
1. Sales/Total Revenue/Size				
2. Market Share				
3. Return: ROA, ROS, ROI				
4. Quality/Customer Service				
5. Human Resources/People				
a. Turnover Rate				
b. Total Work Force				
c. Training Hours/Employees				
d. Safety				
6. Productivity				
7. Public Responsibility/Ethics				
8. Other				

Now for each objective, use this format to develop specific objectives, strategy, and action.

Key Result Area

---

Objective

---

---

---

---

Strategy to achieve objective:

- 1.
- 2.
- 3.

What do I have to do to make it happen?

- 1.
- 2.
- 3.

**VI. STRATEGY (General Overall Strategies)**

- A. Thinking Stage
- B. Where and How to Commit Resources
- C. Timing
- D. How to Achieve Objectives
  - 1. Sales/Total Revenue
  - 2. Market Share
  - 3. Return: ROA, ROS, ROI
  - 4. Some Measure of Efficiency and/or Productivity
  - 5. Quality/Customer Service
  - 6. People/Training/Human Resources/Morale
  - 7. Public Professional Responsibility
  - 8. Other Key Result Strategies

**VII. OPERATIONAL PLAN**

- A. Getting Work Accomplished/What Must Be Done in Short Term
  
- B. Develop Overall Budget and Support Budgets to Accomplish Overall Plan.  
How much is needed during operational year to accomplish objectives?

1.	Overall Budget	\$ _____
2.	Marketing Budget	\$ _____
3.	Production Budget	\$ _____
4.	HR Budget	\$ _____
5.	Staff Support Budgets	\$ _____

- C. Capital Budget is Revised and Developed Yearly

### **VIII. REWARD/PERFORMANCE APPRAISAL**

- A. What team and individual review/reward system/bonus/salary is needed?
- B. Review of performance/schedule overall and support review dates

### **IX. ISSUES/PROBLEMS**

- A. Major
- B. Minor

**X. ANALYSIS**

A. How do you measure cultures?

**XI. ALTERNATIVE SOLUTIONS**

A. List of Alternatives

1.

2.

3.

B. Pros/Cons of each—problems/opportunities associated with each.

1.

2.

3.



**XII. RECOMMENDED COURSE OF ACTION**

A. Alternative Selected and Why It Was Selected

B. Expected Benefit of This Recommendation

C. What Effect Will This Recommendation Have on Performance Income and Balance Sheet Statements?

**SET UP A WAY TO MONITOR HOW YOU ARE DOING AND A WAY TO CREATE ACTION**

An action plan for each objective area should be developed. It helps goals come to life with appropriate action.

**ACTION PLAN**

**OBJECTIVE:**

**STRATEGIES:**

- A.
- B.
- C.
- D.
- E.

<b>Action Plan</b>	<b>Person Responsible</b>	<b>Start Date</b>	<b>Date Completed</b>

## R. HENRY MIGLIORE

Dr. Migliore is President of Managing for Success, an international consulting company. He was Professor of Strategic Planning and Management at Northeastern State University/Oklahoma State University—Tulsa from 1987-2002; Dr. Migliore teaches at the graduate and undergraduate levels. He was formerly Professor of Management and former Dean of the ORU School of Business from 1975 until 1987. He was a visiting professor at the University of Calgary; ITESM Campus Guadalajara, Guadalajara, Jalisco, Mexico; Singapore; and WuYi University in China.

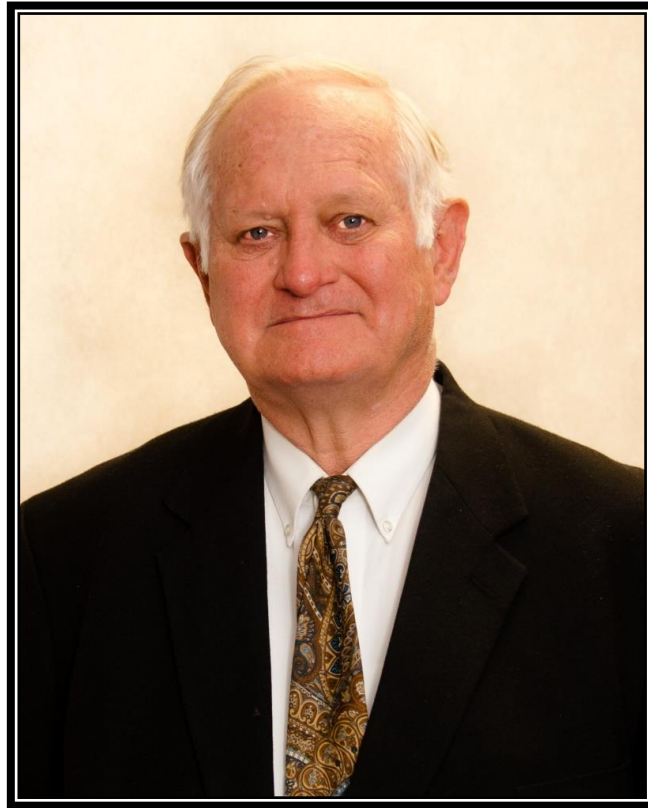
He is former manager of the press manufacturing operations of Continental Can Company's Stockyard Plant. Prior to that, he was responsible for the industrial engineering function at Continental's Indiana plant. In this capacity, Dr. Migliore was responsible for coordinating the long-range planning process. In addition, he has had various consulting experiences with Fred Rudge & Associates in New York and has served large and small businesses, associations, and nonprofit organizations in various capacities. He has made presentations to a wide variety of clubs, groups, and professional associations. Dr. Migliore has been selected to be on the faculty for the International Conferences on Management by Objectives and the Strategic Planning Institute Seminar Series. He is also a frequent contributor to the Academy of Management, including a paper at the 50th anniversary national conference. He served for 12 years on the Board of Directors of T. D. Williamson, Inc., and was previously on the Boards of the International MBO Institute, Brush Creek Ranch, and the American Red Cross/Tulsa Chapter, and is chairman of a scholarship fund for Eastern State College. In 1984 he was elected into the Eastern State College Athletic Hall of Fame. Dr. Migliore has been a guest lecturer on a number of college campuses. He has lectured for the Texas A & M, Pepperdine, ITESM–Guadalajara, Harvard and the University of Calgary Executive Development Programs. He serves on Chamber and/or Civic Committees, and he served on the Administrative Board at The First United Methodist Church, Tulsa, Oklahoma. He was selected Who's Who on a list of 31 top echelon writers and consultants in America.

To date, previous articles on management and business subjects have appeared in *AIIE Journal*, *Construction News*, *Management World*, *Management of Personnel Quarterly*, *Journal of Long-Range Planning*, *Dental Economics*, *Health Care Management Review*, *MBO Journal*, *Business and Society Review*, *Parks and Recreation Journal*, *The Journal of Business Strategy*, *Daily Blessing*, *Ozark Mountaineer*, *On Line*, *Real Estate Today*, *Communication Briefings*, *Journal of Sports Management*, *Alberta Business Review*, *The Planning Review*, *Hospital Topics*, *Journal of East-West Business*, *Journal of Ministry Management*, *IIE Solutions*, *Industrial Safety and Hygiene*, *Debt-Free Living*, *Supply Chain Management*, and two Mexican journals. His books include *MBO: Blue Collar to Top Executive*, *An MBO Approach to Long-Range Planning*, *A Strategic Plan for Your Life*, *Strategic Long-Range Planning*, *Strategic Planning for Church and Ministry Growth*, *Common Sense Management: A Biblical Perspective*, *Personal Action Planning: How to Know What You Want and Get It*, and *Tales of Uncle Henry*. They describe personal theories and experiences. He contributed to the books, *Readings in Interpersonal and Organizational Communication* and *International Handbook on MBO*. The book *The Management of Production: A Productivity Approach* is coauthored. Other books include *Strategic Planning and Management*, *Strategic Life Planning*, and *Common Sense Management*. The manuscript *People, Productivity, and Profits* has been completed. He is coauthoring a series of books with Haworth Press. Released so far are *Church and Ministry Growth* (1995), *Planning for Nonprofit Management* (1995), *Strategic Planning and Health Care* (1996), *Strategic Planning for Private Universities* (1997), and *Strategy Planning for Collegiate Athletics* (spring 2000). *Strategic Long-Range Planning for the New Millennium* was updated and published in January 2012. His books have been translated into Russian, Chinese, Korean, Spanish, German, and Japanese. A Spanish version of *Strategic Planning* was updated Spring 2013. He has also produced "Personal Financial Success," a video training kit offered on nationwide television, and video/audio tapes to go with his books. Dr. Migliore has developed three complete videotaped and computer Internet web-based correspondence courses. January 2013—A new course has been developed and instituted in 2013.

In November 1985 the daily "Managing for Success" cable television program was inaugurated and was on the air until March 1986. It was on Tulsa Cable. The series began again on Tulsa Cable in September 1986. He writes occasional columns for the *Tulsa World*, *Tahlequah Pictorial Press*, *Collinsville News*, *Jenks Journal*, and *Muskogee County Times*. A complete video series with four summary units and thirty-six support units covering planning, management, and common sense management supports other material.

In November 1998 Dr. Migliore was inducted into the Eastern Oklahoma State Hall of Fame. This followed his induction in 1988 into the Eastern Athletic Hall of Fame.

Dr. Migliore has been a small business consultant for the Oklahoma Small Business Development Center for 13 years. Dr. Migliore holds degrees from Eastern Oklahoma State, Oklahoma State University, St. Louis University, and completed his doctorate at the University of Arkansas. He belongs to the Academy of Management and the Planning Executives Institute and is a senior member of the American Institute of Industrial Engineers.



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