STRATEGIC PLANNING TEMPLATE

Company Logo

Date

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# Executive Summary

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## Preferred Option

a.

b.

c.

d.

## Alternatively

a.

b.

c.

d.

# Analysis

## Vision / Mission Analysis

The following table identifies the suitability of the current vision and mission statement, including the values statement where it is separate to the vision and mission

|  |  |
| --- | --- |
| Does the vision or mission | Comment |
| Clearly defined your customers |  |
| Identify the markets your business operates in |  |
| Identify the importance of technology |  |
| Seem concerned for survival, growth & profitability |  |
| State your economic objectives |  |
| Describe your beliefs, aspirations & values |  |
| Identify your competitive strengths |  |
| Include a concern for public image, social community and environment |  |
| Outline the importance of your employees |  |

## Objectives

Describe your business objectives, what you hope to achieve over the next three to five years

|  |  |
| --- | --- |
| Objectives | Metric for Year \_\_\_\_\_\_\_\_\_ |
|  |  |
|  |  |
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|  |  |

## External Environment

|  |  |
| --- | --- |
| Environmental factor | Comments |
| Technological | Are there any technology changes that will affect your business? |
|  |  |
|  |  |
| Economic | Are there any local, national, regional or global technology changes that may impact you or your customers |
|  |  |
|  |  |
| Legal / Political | The legal and government systems within which an organisation functions |
|  |  |
|  |  |
| Socio-cultural | The attitudes, values, norms, beliefs, behaviours and associated demographic trends characteristic of a given geographic area |
|  |  |
|  |  |
|  |  |
| International | The developments outside an organisations home country, with the potential to impact the organisation |
|  |  |
|  |  |

Table A-1 Analysis of the external environment

|  |  |
| --- | --- |
| Opportunities | Threats |
|  |  |

Table A-1.1 Opportunities and Threats in the External Environment

Industry Environment - Porters Five Forces

|  |  |  |
| --- | --- | --- |
| Industry Rivalry | Comment on the extent of competition between competitors | Rating |
| Industry growth rates |  |  |
| High fixed costs |  |  |
| Intermittent over capacity |  |  |
| Product differences |  |  |
| Brand identity |  |  |
| Switching costs |  |  |
| Informational complexity |  |  |
| Concentration & balance |  |  |
| Diversity of competitors |  |  |
| Corporate stakes |  |  |
| Exit barriers |  |  |
| Industry rivalry rating | |  |

|  |  |  |
| --- | --- | --- |
| The bargaining power of customers (buyers) | The degree of customer power, (Bartol, 1996). | Rating |
| Differentiation of outputs |  |  |
| Switching costs |  |  |
| Presence of substitutes |  |  |
| Industry concentration relative to buyer concentration |  |  |
| Importance of volume to buyers |  |  |
| Cost relative to total buyer purchases |  |  |
| Impact of outputs on the cost of differentiation |  |  |
| Buyer information about supplier products |  |  |
| Buyer profitability |  |  |
| Decision makers incentives |  |  |
| Threat of backward integration |  |  |
| Bargaining power of customers (buyers) Rating | |  |

|  |  |  |
| --- | --- | --- |
| The bargaining power of suppliers | The degree of supplier power, (Bartol, 1996). |  |
| Differentiation of inputs |  |  |
| Switching costs |  |  |
| Presence of substitute products |  |  |
| Supplier concentration relative to industry concentration |  |  |
| Importance of volume to suppliers |  |  |
| Cost relative to total purchases in the industry |  |  |
| Impact of inputs on cost or differentiation |  |  |
| Information about suppliers products |  |  |
| Supplier profitability |  |  |
| Decision makers incentives |  |  |
| Threat of forward integration |  |  |
| Bargaining power of suppliers rating | |  |

|  |  |  |
| --- | --- | --- |
| The threat of new entrants | The ease of entry to the market, (Bartol, 1996). |  |
| Economies of scale |  |  |
| Proprietary product differences |  |  |
| Brand identity |  |  |
| Switching costs |  |  |
| Capital requirements |  |  |
| Access to distribution |  |  |
| Absolute cost advantage |  |  |
| Government policy |  |  |
| Expected retaliation |  |  |
| Threat of new entrants rating | |  |

|  |  |  |
| --- | --- | --- |
| Threat of substitute products or services | The extent that different industries offer substitute products, (Bartol, 1996). | Rating |
| Relative price performance of substitutes |  |  |
| Switching costs |  |  |
| Buyer propensity to substitute |  |  |
| Substitutes rating | |  |

|  |  |
| --- | --- |
| Opportunities | Threats |
|  |  |
| Strengths | Weaknesses |
|  |  |

## Internal Analysis

### Culture and Climate

|  |
| --- |
|  |
|  |
|  |
|  |
|  |

Table A-3 Organisational Culture and Climate

### Resources

|  |  |
| --- | --- |
| Tangible Resources |  |
| Financial Resources |  |
| Physical Resources |  |
| Human Resources |  |
| Organisational Resources |  |

Table A-4 – Tangible resources

|  |  |
| --- | --- |
| Intangible Resources |  |
| Technological Resources |  |
| Innovation Resources |  |
| Reputation |  |

Table A-5 – Intangible resources

|  |  |
| --- | --- |
| Strengths | Weaknesses |
|  |  |

Table A-5.1 Strengths and Weaknesses in the Internal Environment

## Financial Analysis

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Year | | | | |
| Ratio |  |  |  |  |  |
| Current Ratio |  |  |  |  |  |
| Quick Ratio |  |  |  |  |  |
| Cash Ratio |  |  |  |  |  |
| Total debit ratio |  |  |  |  |  |
| Debit Equity Ratio |  |  |  |  |  |
| Times Interest Earned |  |  |  |  |  |
| Return on Equity |  |  |  |  |  |
| Return on total assets |  |  |  |  |  |
| Net profit / sales |  |  |  |  |  |
| Expense / sales |  |  |  |  |  |
| Asset turnover |  |  |  |  |  |
| Price Earnings Ratio |  |  |  |  |  |

### Summary of financial Analysis

### WOT - Summary

|  |  |
| --- | --- |
| Strengths | Weaknesses |
|  |  |
| Opportunities | Threats |
|  |  |

## Options

### Option 1

### Option 2

# Choice – what we are proposing to do

# Action Plan

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| No | Action | Due | Owner | Status |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |