

# Strategic Planning projects help your organization unlock growth by focusing your company on your top ~3-5 opportunities

Create a 3-5 year actionable strategic plan that identifies your company's growth opportunities, rigorously assesses those opportunities and estimates their potential bottom-line impact, and prioritizes the top 3-5 strategic initiatives your company should focus on to maximize profitable growth

## Strategic Planning projects address:

- What is the universe of opportunities your company can pursue?
- Where are your most attractive opportunities for growth?
- What risks and challenges does your org face and how do you mitigate them?
- What are the answers to your company's biggest strategic questions?

- Align your organization around your top growth opportunities by rigorously assessing potential growth initiatives and prioritizing the top  $\sim$ 3-5
- **Increase upside growth potential** by identifying and developing plans to mitigate your key risks to growth
- Identify potential paths toward growth by synthesizing and articulating the universe of pot. growth opportunities & their enablers
- Answer your most critical strategic questions by synthesizing potential options, assessing their implications, and aligning around a clear path forward
- **Drive alignment on overall objectives** by getting clarity on your organization's purpose, mission, and vision
- **Better understand your market** by gathering key facts, assessing market forces, and evaluating key competitors
- Better understand your revenue segments and growth trajectory by assessing their current-state revenues, expected futurestate revenue, and top opportunities

### **Strategic Planning: Process Overview**

#### Phase

#### Phase 1: Identify Universe of Value-Creating Initiatives

#### Phase 2: Assess Ideas

### Phase 3: Prioritize Initiatives

#### **Key goal**

- Capture and organize the universe of initiatives that could grow your company
- Conduct a clear, quantifiable analysis of top initiatives to prioritize
- Develop a clear, actionable path toward future growth

#### Key outputs

- Full universe of potential initiatives to grow your business
- Growth initiatives' sizing and ability to execute
- Top ~3-5 growth initiatives
- ~3-5 year granular growth plan

### **Key** activities

- Internal stakeholder interviews
- Market research (e.g., size)
- Competitor case studies
- External expert interviews
- Initiative framework
- Initiative list synthesis

- Initiative sizing methodology
- Initiative sizing (e.g., est. EBITDA impact)
- Ability to execute assessments

- Initiative size scoring
- Ability to execute scoring
- Score-based initiative prioritization
- Prioritization review and finalization