

# THE DOWN AND DIRTY

# 10 STEP STRATEGIC PLANNING PROCESS

for small businesses who want to succeed

START!

## 1 Gather your team

Take a half day or a full day. Include employees from all key areas. Take turns leading the session.



## 2 Do SWOT Analysis

4 pieces of large paper. Brainstorm actively - EVERYONE talks!



## LOOK 3 ...at competitors

Websites, print materials, social media. Ask friends & customers for perceptions of their strengths and weaknesses. **How can you differentiate?** Any products or services they offer that you need to add?



## 4 ...at your markets

How are they changing? Where can you sell deeper? **What are customers asking for?** How can you communicate with? Any market specific opportunities or threats?



## ASK 5 ...your employees

**What would make your job easier?** What are the top issues you keep running into? What do you think we need to do to get to the next level?



## 6 ...your customers

**What can we do better?** What services or products do you wish we could offer? (Leader and sales team should do this step)

## AIM

## 7 Identify your Big Rocks

What are the top 3-5 things you will work on this year that will take your business to the next level?

WRITE THESE DOWN.

## 8 List tasks for each Big Rock

This is what we need to do to move each Big Rock. Write down, assign deadlines and who is responsible for each.

## TRACK

## 9 Meet regularly to work on and report progress.

Weekly or monthly depending on the task, with whichever employees are responsible for each task.

REPEAT

## 10 EVERY YEAR!

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