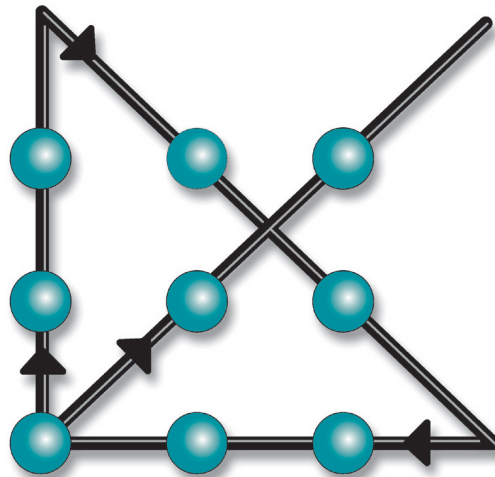


Company Planning Process

CMI'S Process For Strategic Planning

My company

My name



CMI

Strategic Planning For Today's Challenging Business Environment

These worksheets are designed to allow you to complete the past year and open up the possibility of the next year. It directs your attention and thinking to critical areas. It is not a guarantee. However, it is an opportunity to think through and focus your activity. Take as much space as you need. Do not be limited by the space we gave you.

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Achievements/successes for the past year

1.	
2.	
3.	
4.	

Disappointments for the past year

1.	
2.	
3.	
4.	

What did we learn as a company in the past year?

1.	
2.	
3.	
4.	



What critical issues face us over the next 12-18 months?

1.	
2.	
3.	
4.	
5.	

Of the critical issues facing us, which ones are we dealing with?

1.	
2.	
3.	
4.	
5.	

In 2022, What are we going to start doing?

1.	
2.	
3.	
4.	



5.	
----	--

In 2022, What are we going to stop doing?

1.	
2.	
3.	
4.	
5.	

In 2022, What will we keep doing?

1.	
2.	
3.	
4.	
5.	

Do a SWOT on your Company

Strengths, weaknesses, threats, and opportunities

What are our company strengths? Underline the ones you want to build on.

1.	
2.	



3.	
4.	

What are our company weaknesses? Underline the ones that are critical to be improved.

1.	
2.	
3.	
4.	

How will your company enhance underlined strengths and improve underlined weaknesses?

1.	
2.	
3.	
4.	

What threats face the company and underline the ones that need to be dealt with.

1.	
2.	



3.	
4.	
5.	

What opportunities face the company and underline the ones that you are acting on.

1.	
2.	
3.	
4.	
5.	

How will your company improve its underlined threats and capitalize on its opportunities?

1.	
2.	
3.	
4.	
5.	



What ideas would improve the company's customer service towards internal customers and external customers?

1.	
2.	
3.	
4.	
5.	

Opportunities facing the company

Opportunities	Bottom Line Value	Can We Do It?	Leadership Effort	Risk



Scale

- Bottom line value: 1-10, with 1 = very low
- Can we do it? 0% - 100%
- Leadership effort: High, moderate, or low
- Risk: High, moderate or low

What unresolved issues face the company - How will we resolve them?

1.	
2.	
3.	
4.	

What is the purpose and mission of the company?



What is a measurement system that the company will use to determine if it is progressing in the desired direction and attaining its objectives?

What are the company's clear measurable objectives for the next year?

(No more than 10)

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	



9.	
10.	

What objectives need action plans and who is writing them? Who are the champions of the objectives?

Action Plans		Who Is Writing Them?
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		



When and how will we monitor our progress on the objectives?

What individual and group projects and commitments are you committing to?

1.	
2.	
3.	
4.	

What is the company's meeting structure? When? Who sets the agenda?

1.	
2.	
3.	
4.	
5.	



What are the company's ground rules?

1.	
2.	
3.	
4.	

See The Future

Ask questions to arrive at a workable vision. Ask yourself, ask your spouse or partner, friends, coworkers, and business associates. The answers are not, in themselves, your vision, but they will help you get there.

1. What is your vision for your group, company, or organization?

2. Complete this sentence: It would be cool if...



3. **Complete this sentence: We are working towards...**

4. **Complete this sentence: I lead best when I...**

Evaluate This

Whether formally or informally, help yourself and others to focus on positive elements when reviewing performance and redesigning job functions.

1. **How would you redefine your job focus on strengths and interest?**

2. **What task or function would you like to do more?**



3. What motivators work for you?

4. Do you praise well? How?

5. Think of the last time you received negative feedback. How did you listen? What did you learn?
