

**A companion guide for the Strategic Planning  
for Managers and Consultants Webinar Series**

# **Strategic Planning Workbook**

A simple effective program  
for managers and consultants

**Andrew Rixon PhD**

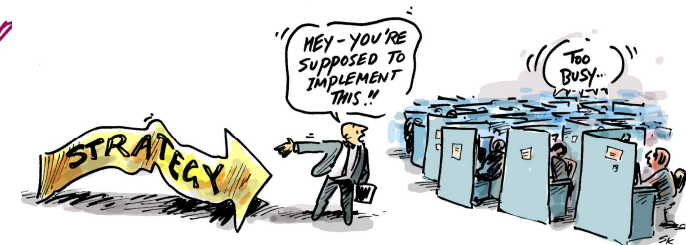
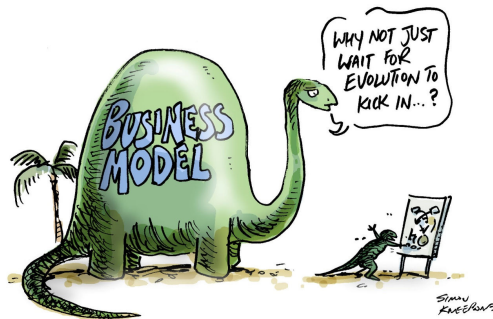
Illustrations by: Simon Kneebone

# A companion guide for the Strategic Planning for Managers and Consultants Webinar Series



This workbook contains the key support materials for:

- Profiling your Strategy Preferences
- **Webinar 1:** Business Model Tools
- **Webinar 2:** Strategic Planning Processes
- **Webinar 3:** Strategy Implementation



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This workbook and the Webinar Series has been designed around the Bob De Wit and Ron Meyer Strategy Tensions Framework.

Use the Strategy Tensions Framework as a Kick-Starter into Strategy.

The following page describes the architecture of the Webinar Series and the associated Strategy Tensions.

## Process: How, Who, When

Strategic Thinking, Strategy Formation, Strategic Change

Webinar 2: Process for Strategic Planning

Webinar 3: The Silent Killers of Strategy Implementation

## Content: What

Business Level, Corporate Level, Network Level Strategy

Webinar 1: Business Models

## Context: Where

Organisational Context, Industry Context, International Context

Webinar 1: Business Models

Webinar 3: The Silent Killers of Strategy Implementation

## Purpose: Why

Webinar 2: Processes for Strategic Planning

Strategy Tensions



# Profiling your Strategy Preferences

**Review the following pages to become familiar with the model of the Strategic Tensions and identify where your preference lies with regards to the specific tensions.**

**These tensions can be used as the basis for individual and/or executive team discussions.**

**The strategic tensions are a kick-starter to Strategy.**

# Process: How, Who, When

Strategic Thinking, Strategy Formation, Strategic Change

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# Purpose: Why

Strategy Tensions

# Strategic Thinking

A word cloud of terms related to strategic thinking, displayed on a black background. The words are arranged in a roughly triangular shape, with 'Science' at the top and 'Intuition' at the bottom. The words are in various colors and orientations, including horizontal, vertical, and diagonal. The colors include shades of orange, red, green, yellow, and white.

Science  
Creativity  
Objectivity  
Logic  
Data  
Gut-Feel  
Imagination  
Big-picture-thinking  
Facts  
Vision  
Calculated-Risk  
Intuition



# Strategy Formation

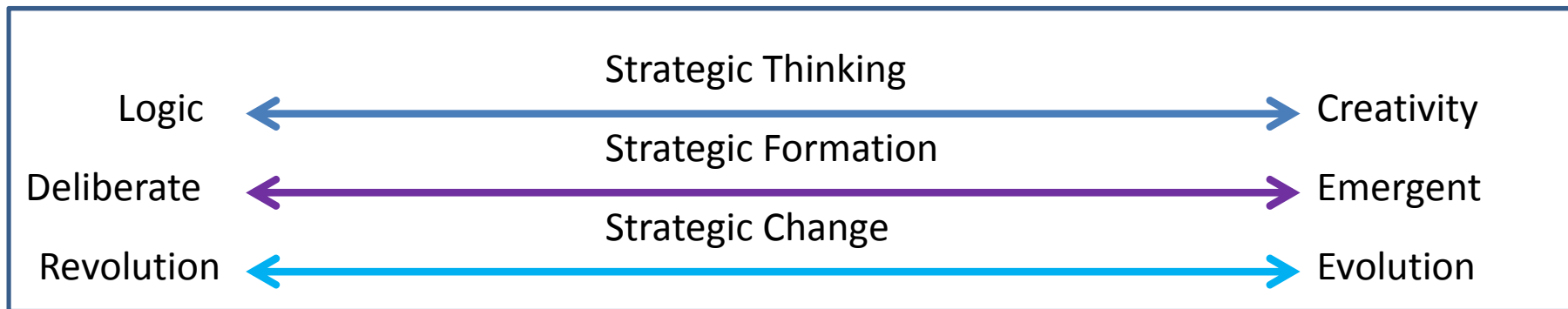
A word cloud of strategy formation terms. The words are arranged in a roughly triangular shape, with 'Learn-as-you-go' at the top left and 'Experiment' at the bottom left. The words are in various colors: brown, green, and yellow. The terms include: Learn-as-you-go, Adapt-and-grow, Think-before-you-act, Opportunistic, Long-term-planning, Adapt-to-the-environment, No-Surprises, Experiment, Forecast, Go-with-the-flow, Plan, and Improvise.

Learn-as-you-go  
Adapt-and-grow  
Think-before-you-act  
Opportunistic  
Long-term-planning  
Adapt-to-the-environment  
No-Surprises  
Experiment  
Forecast  
Go-with-the-flow  
Plan  
Improvise

# Strategic Change

A word cloud of strategic change phrases on a black background. The phrases are arranged in a roughly rectangular shape, with some overlapping. The colors of the text include yellow, orange, red, white, and green.

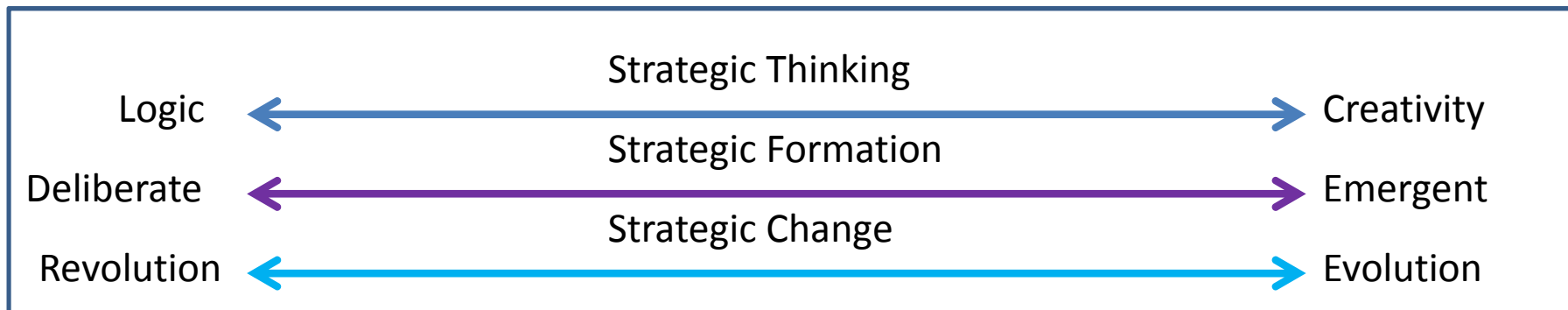
Start-with-a-clean-slate  
Heads-will-roll  
Ambition  
Step-by-step  
Make-war  
Routine  
Disciplined-approach  
Continuous-Improvement  
Burn-the-platform  
Slow-and-steady-wins-the-race  
Don't-rock-the-boat  
Fast-track



*Where are you in relation to your personal preference and the tensions?*

*Place an “X” on the tension lines for each of the tensions.*

*You may find it helpful to review the list of descriptors over-page.*



*Logic*

*Facts*

*Data*

*Calculated-Risk*

*Science*

*Objectivity*

---

*Think before you act*

*Long-term planning*

*Adapt to the environment*

*Plan*

*Forecast*

*No Surprises*

---

*Start-with-a-clean-slate*

*Make-war*

*Ambition*

*Burn-the-platform*

*Fast-track*

*Heads-will-roll*

*Creativity*

*Intuition*

*Imagination*

*Gut-Feel*

*Big-picture-thinking*

*Vision*

---

*Learn-as-you-go*

*Experiment*

*Improvise*

*Go-with-the-flow*

*Adapt-and-grow*

*Opportunistic*

---

*Continuous-Improvement*

*Slow-and-steady-wins-the-race*

*Step-by-step*

*Routine*

*Don't-rock-the-boat*

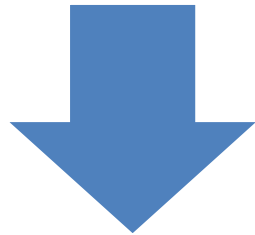
*Disciplined-approach*

Strategy Tensions Profile

# Business Level Strategy

A word cloud of business strategy terms arranged in a cross shape. The terms are: Strike-while-the-irons-hot, Working-from-the-inside-out, Know-how, Market-driven, Competencies, Opportunity-driven, Positioning, Customer-firsts, What-customers-want, Leveraging-our-strengths, Capabilities, and Resources.

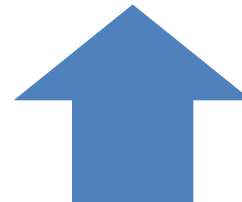
Strike-while-the-irons-hot  
Working-from-the-inside-out  
Know-how  
Market-driven  
Competencies  
Opportunity-driven  
Positioning  
Customer-firsts  
What-customers-want  
Leveraging-our-strengths  
Capabilities  
Resources



**Resources**  
**Capabilities**  
**Competencies**  
**Know-how**  
**Leveraging-our-strengths**  
**Working-from-the-inside-out**



*Customer-first*  
*Market-driven*  
*Opportunity-driven*  
*Positioning*  
*What-customers-want*  
*Strike-while-the-irons-hot*



Strategy Tensions Profile



*Where are you in relation to your personal preference and the tension?*

*Place an "X" on the tension line which represents where your preference sits.*

*What does this mean for you? What's the impact of this preference?*

# Industry Context

A word cloud of industry-related terms and phrases. The words are arranged in a roughly horizontal shape, with some vertical text on the left and right sides. The colors are primarily shades of red and orange.

Create-the-rules  
Play-by-the-rules  
Radically-innovate  
Lead  
Carve-out-a-niche  
The-second-mouse-gets-the-cheese  
Imitation-is-the-greatest-form-of-flattery  
Choice  
Follow  
Adapt  
Shape-the-industry  
Shape-the-firm



# Organisational Context





*Where are you in relation to your personal preference and the tensions?*

*Place an "X" on the tension line which represents where your preference sits.*

*What does this mean for you? What's the impact of these preferences?*



**The-second-mouse-gets-the-cheese**  
**Imitation-is-the-greatest-form-of-flattery**  
**Adapt**  
**Follow**  
**Play-by-the-rules**  
**Shape-the-firm**

---

**Control**  
**Top-down**  
**Create-initiatives**  
**Strong-leadership**  
**New-brooms-sweep-clean**  
**Fast-change**

**Choice**  
**Radically-innovate**  
**Carve-out-a-niche**  
**Create-the-rules**  
**Lead**  
**Shape-the-industry**

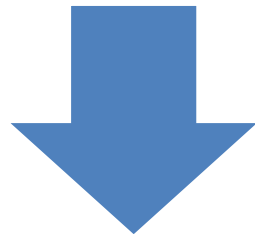
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**Trust-your-people**  
**Bottom-up**  
**Create-the-conditions**  
**Effortless-effort**  
**Shared-leadership**  
**Self-Organisation**

# Purpose



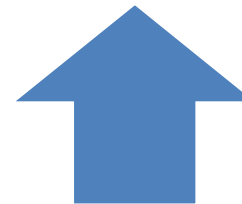
Profitability ← **Organisational Purpose** → Responsibility



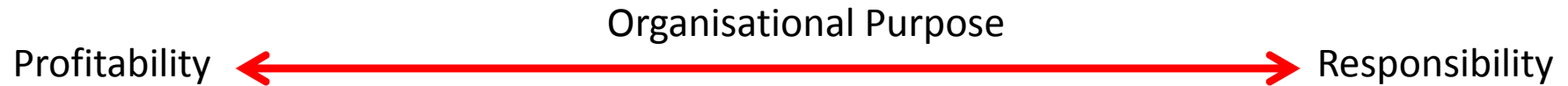
**Responsibility**  
**Satisfaction-among-all-stakeholders**  
**Social-responsibility**  
**Sustainability**  
**People-before-profit**  
**Crowdfunding**



**Cash-cows**  
**Profitability**  
**Return-On-Investment**  
**Shareholders**  
**The-Business-of-Business-is-Business**  
**\$\$\$**



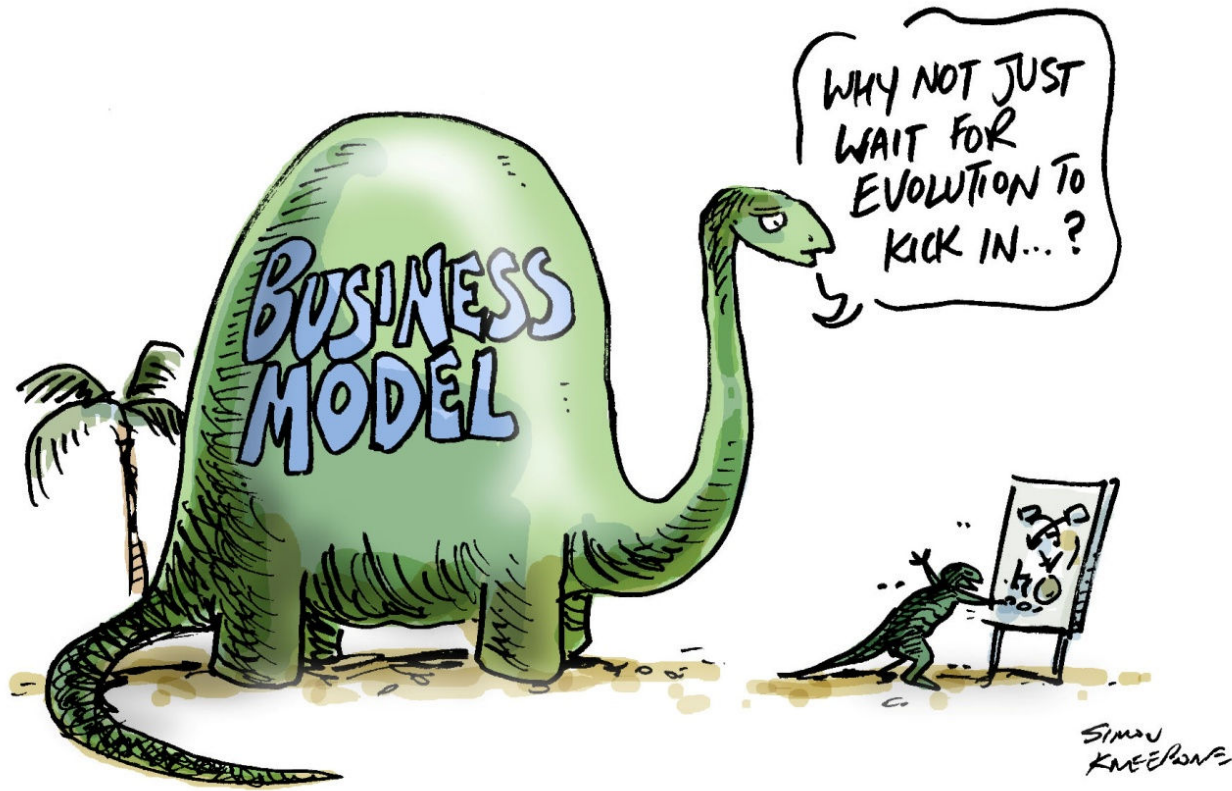
**Strategy Tensions Profile**



*Where are you in relation to your personal preference and the tension?*

*Place an "X" on the tension line which represents where your preference sits.*

*What does this mean for you? What's the impact of this preference?*



# Business Model Tools

**Use the following pages to help  
you think about your  
companies Business Model and  
the context and environment  
that it is operating in.**



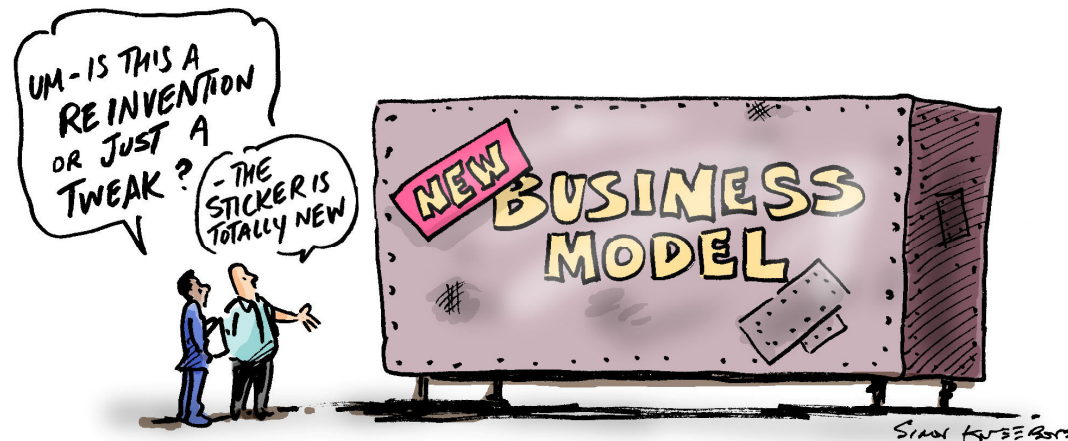
# PEST Analysis Worksheet – “WHY NOW?”

Identify trends in the environment that are relevant to your business. Are they favourable or unfavourable? Overall, is the timing right?

|                             |                   |
|-----------------------------|-------------------|
| <b>POLITICAL</b>            | <b>ECONOMIC</b>   |
| <b>SOCIAL / DEMOGRAPHIC</b> | <b>TECHNOLOGY</b> |

# Re-Inventing Your Business-Model

Identify on the next page what your  
CVP, Profit Formula, Key Processes  
and Resources are within your  
Business.

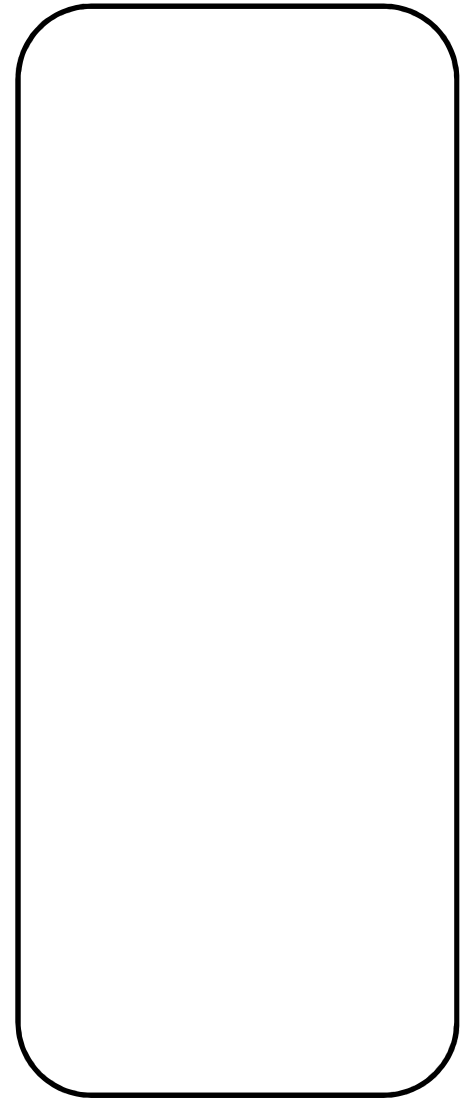
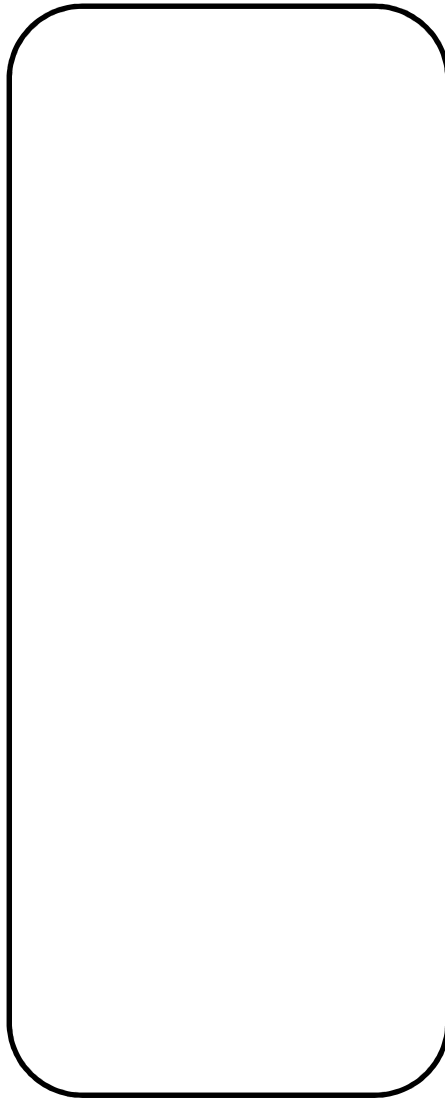


Customer  
Value  
Proposition

Profit  
Formula

Processes

Resources



**Markets**  
Outside-In

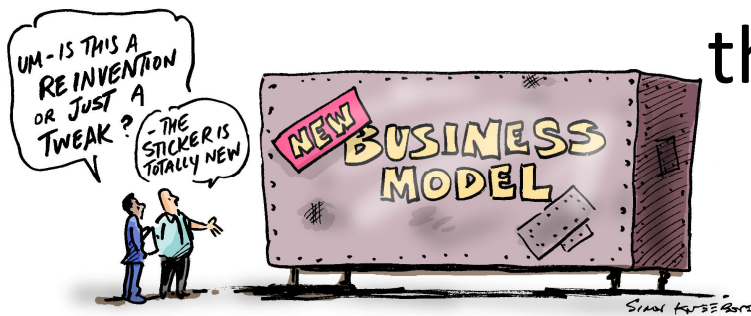


**Resources**  
Inside-Out

Can you devise a model in which all elements:

- **Customer Value Proposition**
- **The Profit Formula**
- **The Key Resources**
- **The Key Processes**

Work together to accomplish the job in  
the most efficient way ?



# SWOT Analysis Worksheet

Identify the internal Strengths and Weakness within your business. Identify external Opportunities and Threats.  
What are the implications?

|                   |                      |
|-------------------|----------------------|
| <b>STRENGTHS</b>  | <b>OPPORTUNITIES</b> |
| <b>WEAKNESSES</b> | <b>THREATS</b>       |

**Internal**

**External**

**Review the following YouTube Clip to learn about Porter's 5 Forces. A tool that helps you consider how profitable the industry your business is in.**

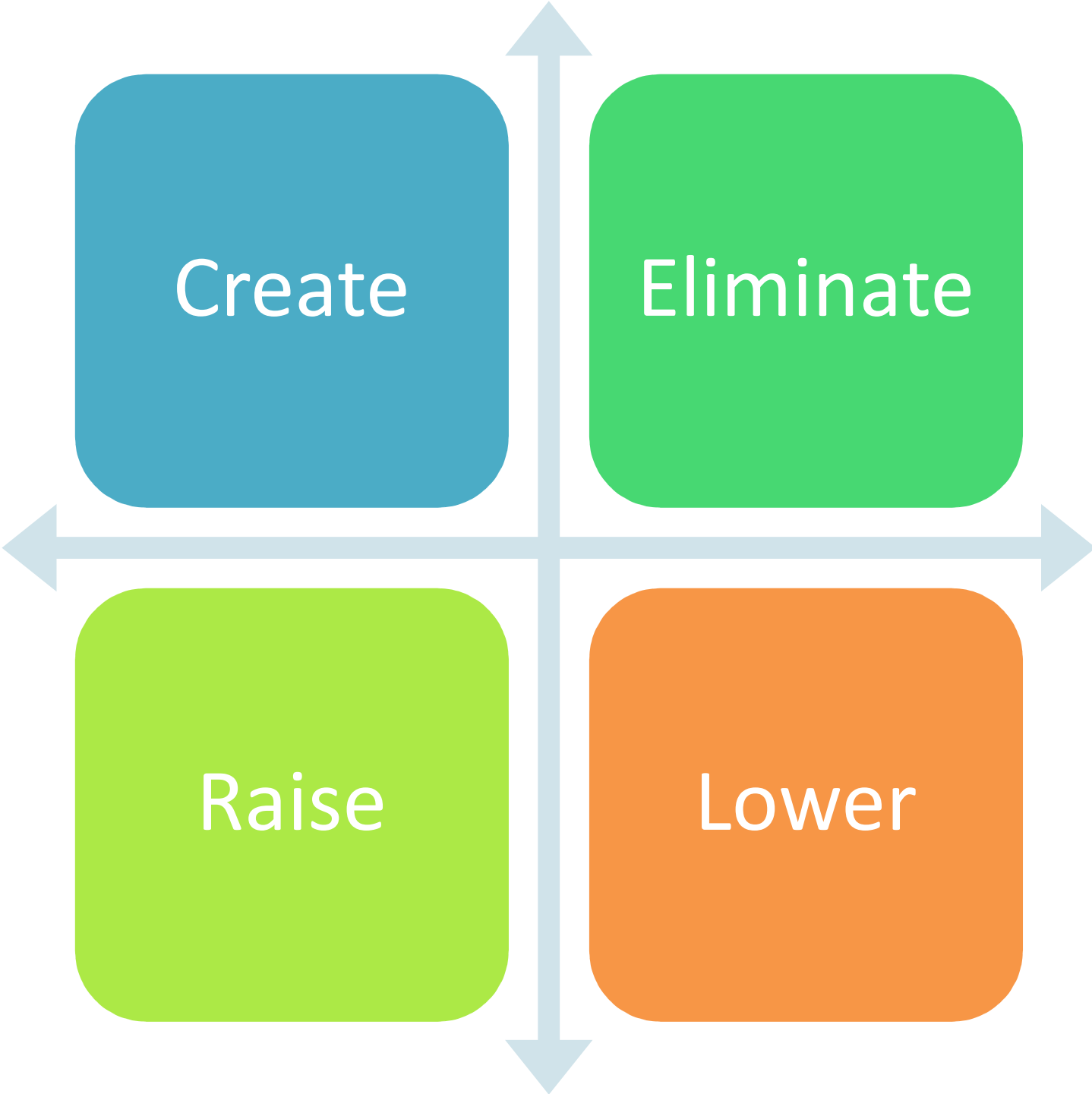


<http://www.youtube.com/watch?v=2FzYhdS4pqM>

**Review the following YouTube Clip to learn more about the Blue Ocean Strategy. A creative tool for re-inventing your Business Model. On the next page – consider how you might use the CERL Framework for your Business.**



<http://www.youtube.com/watch?v=HJH0g-EPGDs>



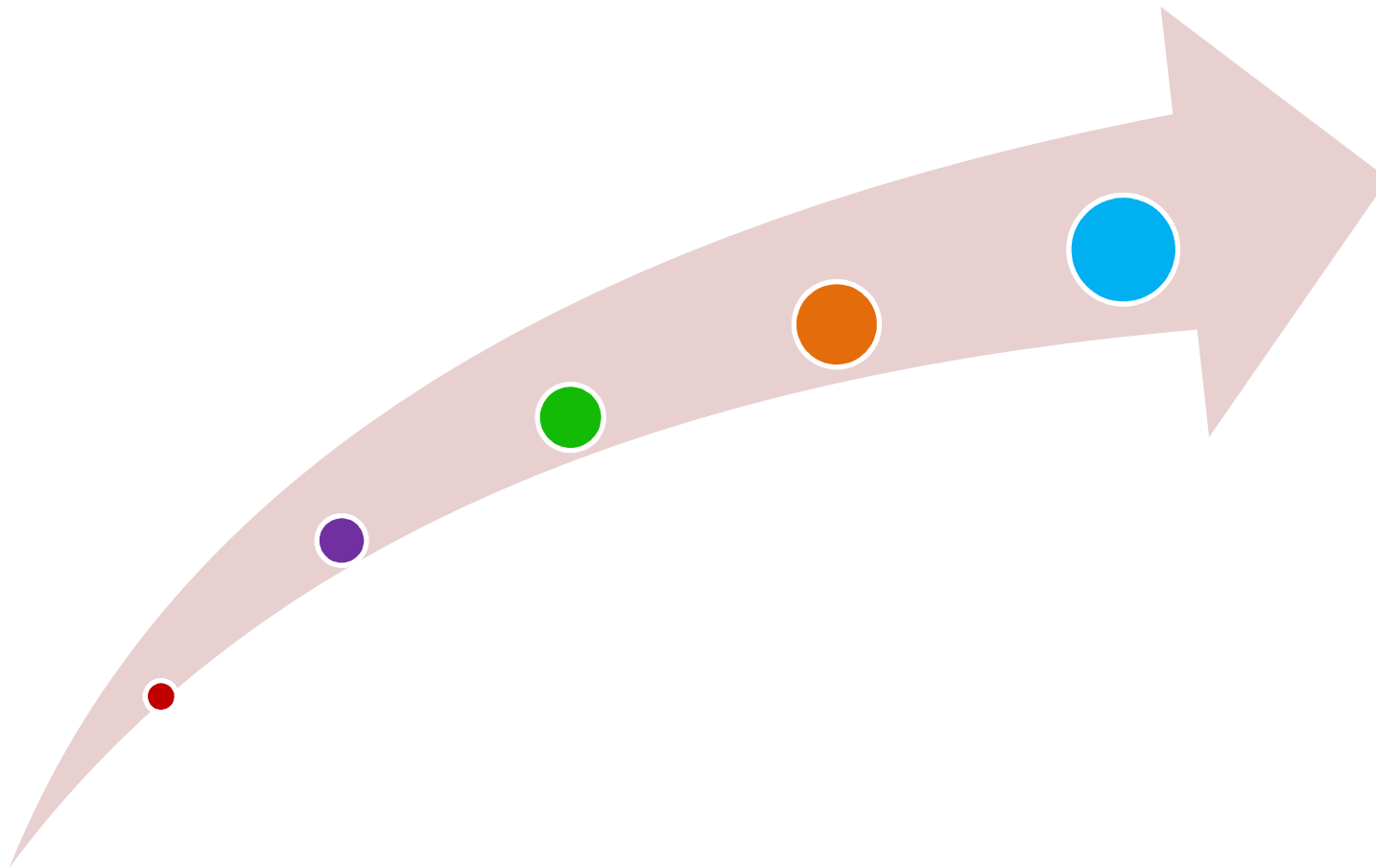




# Strategic Planning Processes

**Use the following pages as a  
reminder for the key steps in  
the Snyder Process.**

# The Snyder Process



More reading here: <http://www.aral.com.au/areol/areol-session11.html>

# Vision



# Vision

**Take a moment...**

**Think about where you'd like to see yourself in 5 years time...**

**Vision**

**Targets**





**Vision**

**Targets**

**Keeping your Vision in mind...**

**What would you like to have achieved within 12 months?**

**Vision**

**Targets**

**Resources**





**Take a moment to brainstorm...**

**What are all the resources you have available to help you?**

**Resources**

**What are your Strengths?**

**Resources**

**Vision**



**Targets**

**Activities**

**Resources**

**Vision**



**Targets**



**List all your current activities...**

(Activities consume Resources)

**Activities**



**Resources**



**Vision**



**Targets**

**Effects – Intended and Unintended**  
(Immediate Effects from the Activities)

**Activities**

**Resources**

**Once all the steps are complete –  
have a look at the relationship  
across the “arrows”.**

**Are there any *orphans* regarding  
how the Effects connect to the  
Targets? How about between  
Targets and Vision?**

**Vision**

**Targets**

**Effects – Intended and Unintended**

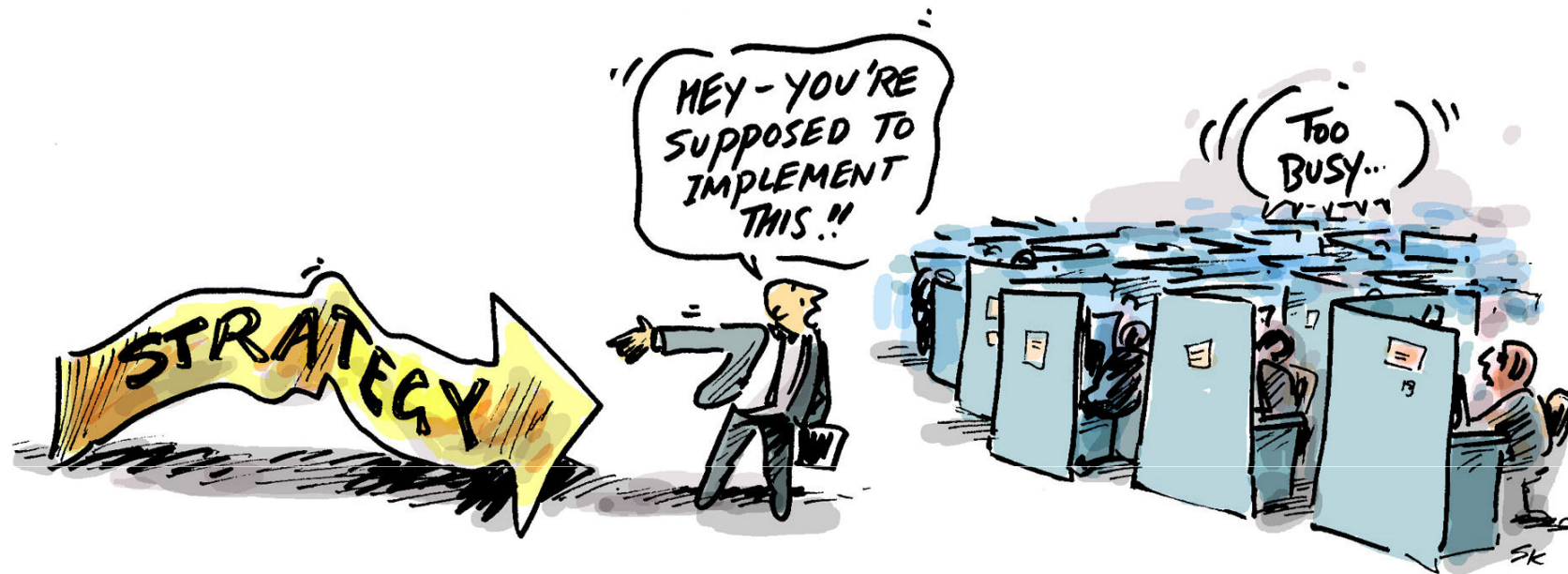
**Activities**

**Resources**



**The final step is to sample across  
the Vision, Effects and  
Resources to develop the Key  
Performance Indicators that  
can be used in a moment-to-  
moment way for providing  
feedback.**





## Strategy Implementation

**The following pages outline the  
simple yet effective process  
known as the Pre-Mortem.**

**Effectively used in combination  
with the Snyder Process.**

# The Pre-Mortem

Think about your plan...  
It failed. Why?



What are the actions you can take now to address the key themes emerging?



## Process: How, Who, When

Strategic Thinking, Strategy Formation, Strategic Change

Webinar 2: Process for Strategic Planning

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Webinar 2: Processes for Strategic Planning

Strategy Tensions

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