

# 6 Month Strategic Plan

Presented by Rick Leibowitz, REPCFO

[rick@repcfo.com](mailto:rick@repcfo.com)

# Setting the Container

- ▶ Planning process for the next six months
- ▶ Standard strategic planning practices
- ▶ Sharing tools/discussion to be more effective with your process

# Short Term Strategy

- ▶ Where were we going?
- ▶ Where are we now?
- ▶ Where do we go from here?

# Start with Why

- ▶ Who are your best customers?
- ▶ Why do they love you?
- ▶ What do they say about you?
- ▶ What do you want them to say about you?

# SWOT Analysis

## Strengths

- Internal/Present
- Positive results

## Opportunities

- External/Potential
- Milestones

## Weaknesses

- Internal/Present
- Negative results

## Threats

- External/Potential
- Contingencies

# Transaction Overview

- ▶ How are you currently selling your products/services?
- ▶ Build upon your strengths and opportunities
- ▶ Quantify your margins

THE

HOLY GRAIL

FOR A **MARKETER** IS NOT A  
**TRANSACTIONAL**  
**RELATIONSHIP**

BUT AN

**EMOTIONAL**  
RELATIONSHIP  
**WITH THE CONSUMER**

APU GUPTA, CURALATE

# Value Message

- ▶ Benefit focused
- ▶ Be remarkable to your customers
- ▶ Be different than your competition





# Marketing Message

- ▶ Craft your value message into a brand message
- ▶ Get emotional
- ▶ Leave no doubt about your purpose in ALL COMMUNICATIONS



# Operational Message

- ▶ Improve your product/service delivery plan
- ▶ Communicate with your team
- ▶ Standards and visual reminders

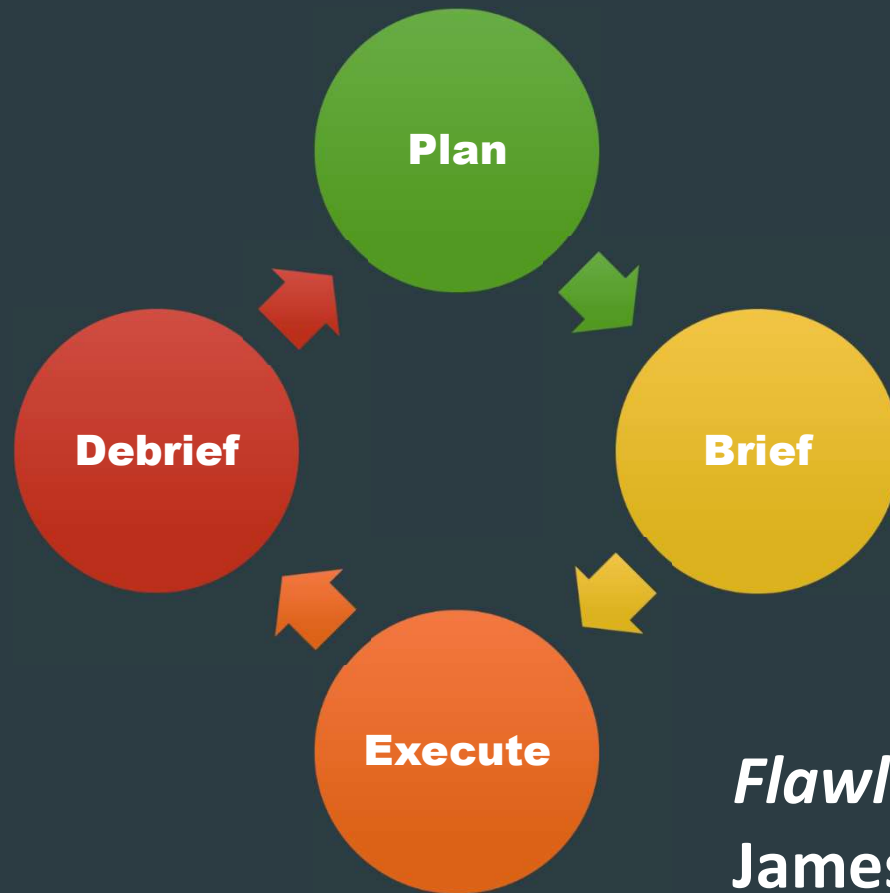


*“What you do speaks so loudly I can’t hear what you are saying.” Ralph Waldo Emerson*

# Milestones

- ▶ Clear measures of where you should be
- ▶ Your numbers should have a corresponding narrative
- ▶ Be prepared to check results and update

# Process - not an event!



*Flawless Execution* -  
James D. Murphy

# This Quarter

- ▶ What are your limited revenue opportunities?
- ▶ What does it cost you to keep your business going?
- ▶ What can you do next week to lessen the hurt?

# Start with Small Steps

- ▶ You are adjusting your strategies, NOT changing your business
- ▶ Weekly iterations of manageable, short term strategies
- ▶ Focus on what you control the most

# Short Term Catalysts

- ▶ Sell something new
- ▶ Sell an added value
- ▶ Reduce an expense
- ▶ Fine tune a process
- ▶ Talk to a customer

# Make Strategy a Habit

- ▶ Schedule strategy sessions
- ▶ Document plans in writing and date (revisit to get better)
- ▶ Be accountable to results, not completing tasks

**“We are  
what we repeatedly do.  
Excellence, then,  
is not an act,  
but a habit.”**

~Aristotle



# Repeat Next Quarter

- ▶ How do you rebound?
- ▶ Any revisions to your purpose?
- ▶ What tools are needed?
  - ▶ Equipment
  - ▶ Staffing
  - ▶ Standard Operating Procedures?
- ▶ What's your message?

# A Different Marketplace?

- ▶ Values -social distance-  
hygiene-trust
- ▶ More stay at home commerce
- ▶ Supply chain repair

"Life comes at us in waves. We can't predict or control those waves, but we can learn to surf."

— Dan Millman



peaceful-warrior  
way





**YOU HAVE TO  
THINK  
STRATEGIC TO BE  
STRATEGIC.**

© 2014 McKinsey & Company