



# *Strategic Planning Pre-Work Packet For Entrepreneurs of Faith*



*Some plans aren't always accomplished, but the planning process is priceless.*

*-Dwight Eisenhower*

Adapted from the late Don Cope and his work in helping entrepreneurs do strategic planning.

# *Wise Counsel*

## Strategic Plan Pre-Work

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#### Overview

- CEO/Owner Background
- Company Values / Philosophy
- Trends and Events
- Vision and Mission

#### Corporate Assessment

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- Organization and Staffing
- Financial and Administrative
- Production / Distribution
- SWOT Analysis

#### Ministry Plan

#### Role of CEO

- Exit Strategy

#### Corporate Goals for the year

- Bottom Line
- Key Indicators

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Company: \_\_\_\_\_

WC Group: \_\_\_\_\_

**WISE COUNSEL**  
**STRATEGIC PLAN PRE-WORK**  
**CEO / OWNER BACKGROUND**

---

When Started / Joined Company

---

Born / Raised

---

Schooling

---

Before Company Did

---

Growth of Company

---

Niche / Market

---

Describe business in five years

---

What do you enjoy most in life?

---

Your job?

---

What is your purpose in life?

---

Achieved?

---

Are or will your children be involved in business?

---

How?

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***COMPANY VALUES / PHILOSOPHY***

For each set of choices below which might apply now, place an X at the point in the line which most represents your values / philosophy for the company. Next place a 0 on the line where you feel the company actually operates and a Y where you want the company to be.

### Comment

---

Low Risk / High Risk

---

Free Flowing / Planned

---

Profit Growth / Volume Growth

---

Return on Investment / Return on Sales

---

Controlled Growth / Aggressive Growth

---

Quality / Quantity

---

Market Concentration / Diversification

---

Austere Spending / Free Spending

---

High Leverage / Little Debt

---

Authoritative / Participative

---

Traditional Methods / Modern Methods

---

Complex Processes / Simple Processes

---

Closed Information / Open Information

---

Paternalism / Independence

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***COMPANY VALUES / PHILOSOPHY (CONT')***

---

Low Profile / Public Exposure

---

Low price image / High price image

---

Low cost producer / Quality for a price

---

Centralized / Decentralized

---

Broad span of control / Narrow span of control

---

Regional markets / National markets

---

National markets / International markets

---

Controlling board / Controllable board

---

Dividends / Retained earnings

---

Promote from within / New blood

---

Private ownership / Public ownership

---

Management interests / Stockholder interests

---

Building to sell / Building for heirs

---

Formal environment / Informal environment

---

Product follower / Product innovator

---

Others?

Member: \_\_\_\_\_

Date: \_\_\_\_\_

# ***VISION AND MISSION***

## **Vision Statement**

(Vision / Picture from the Lord / Eternal in View of CEO)

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## **Mission Statement**

(Sense of Purpose in serving Customer / Lord / Employees around Quality / Service / Calling in Business / Developed with Staff)

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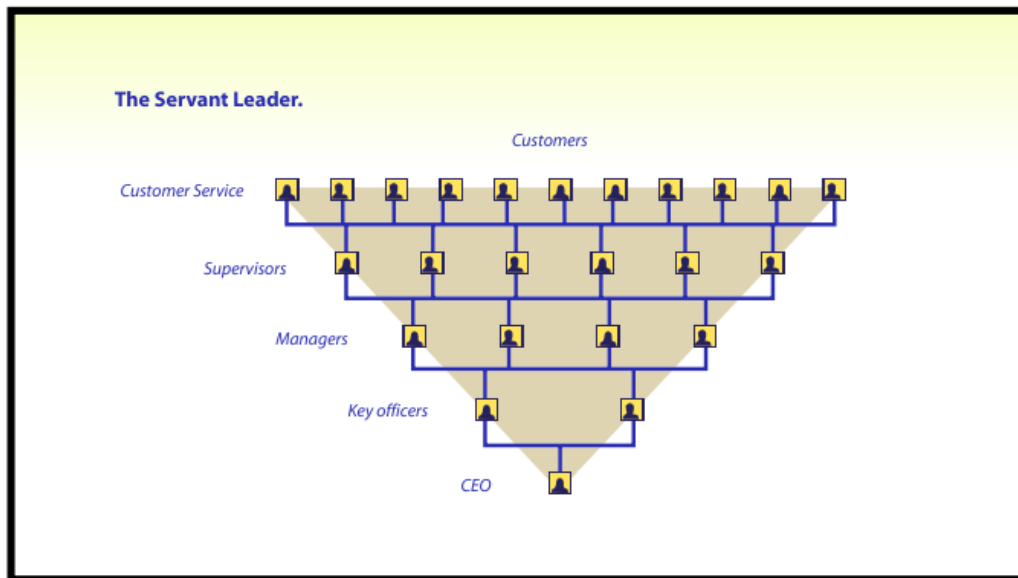
Why? Has God called you to this enterprise? \_\_\_\_\_

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# Organization Chart

Best organizational chart is a servant leader model taught by Jesus Christ. The CEO is at the bottom serving his officers as they serve middle management and then customer service, then finally the customer is at the top.



Member:

Date: \_\_\_\_\_

## **MARKETING AND SALES**

- |   |       |       |       |
|---|-------|-------|-------|
|   | Year  | Year  | Year  |
| 1. Gross Sales \$ _____ Sales Trend up/down %         | _____ | _____ | _____ |
| 2. Projected sales next year _____ Why? _____         |       |       |       |
| 3. Describe end user of your product / service: _____ |       |       |       |

4. What is customer most concerned about?

| (5=High 1=Low) | Rate  | Comments |
|----------------|-------|----------|
| Price          | _____ | _____    |
| Availability   | _____ | _____    |
| Quality        | _____ | _____    |
| Service        | _____ | _____    |
| Brand          | _____ | _____    |
| Reputation     | _____ | _____    |
| Terms          | _____ | _____    |
| _____          | _____ | _____    |
| _____          | _____ | _____    |

5. Describe distribution methods: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Describe your marketing strategy: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

| 7. List key competitors | Market Share % | Main Strength / Weakness |
|-------------------------|----------------|--------------------------|
| a. _____                | _____          | _____                    |
| b. _____                | _____          | _____                    |
| c. _____                | _____          | _____                    |

| 8. Your Competitive Advantages | Weaknesses |
|--------------------------------|------------|
| a. _____                       | a. _____   |
| b. _____                       | b. _____   |
| c. _____                       | c. _____   |



Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***MARKETING AND SALES (CONT')***

9. Key trends / changes in your industry

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

Your reaction

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_
- d. \_\_\_\_\_
- e. \_\_\_\_\_

10. What changes will you make in your product / marketing in the future?

\_\_\_\_\_

11. Key Customers

% of gross sales

Change up / down

Good / Bad

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12.

Rate

Comments

Advertising

\_\_\_\_\_

\_\_\_\_\_

Promotion

\_\_\_\_\_

\_\_\_\_\_

Sales

\_\_\_\_\_

\_\_\_\_\_

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***ORGANIZATION AND STAFFING***

**Attach organization chart comments**

Total Employees \_\_\_\_\_ Mgmt. \_\_\_\_\_ Sales \_\_\_\_\_ Administration \_\_\_\_\_

Other \_\_\_\_\_

**Key People**

| Name     | Rate<br>(5=High 1=Low) | Comments |
|----------|------------------------|----------|
| 1. _____ | _____                  | _____    |
| 2. _____ | _____                  | _____    |
| 3. _____ | _____                  | _____    |
| 4. _____ | _____                  | _____    |
| 5. _____ | _____                  | _____    |
| 6. _____ | _____                  | _____    |

|                          | Rate  | Comments |
|--------------------------|-------|----------|
| Teamwork                 | _____ | _____    |
| Staff Meetings           | _____ | _____    |
| Communication            | _____ | _____    |
| Morale                   | _____ | _____    |
| Middle Management People | _____ | _____    |
| Hourly People            | _____ | _____    |
| Sales Staff              | _____ | _____    |
| Compensation / Incentive | _____ | _____    |
| Management Training      | _____ | _____    |
| Technical Training       | _____ | _____    |
| Employee Orientation     | _____ | _____    |
| Upward Mobility          | _____ | _____    |
| Accounting Department    | _____ | _____    |
| Personnel Formation      | _____ | _____    |
| Performance Review       | _____ | _____    |
| Recruiting Methods       | _____ | _____    |
| Selection Methods        | _____ | _____    |
| Turnover                 | _____ | _____    |
| Decision Making          | _____ | _____    |
| Harmony                  | _____ | _____    |
| Respect for Company      | _____ | _____    |
| Respect for CEO          | _____ | _____    |

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***FINANCIAL / ADMINISTRATIVE***

### **Compare Service of**

|                 | <b>Rate</b> | <b>Comments</b> |
|-----------------|-------------|-----------------|
| Banker          | _____       | _____           |
| CPA             | _____       | _____           |
| Attorney        | _____       | _____           |
| Insurance Agent | _____       | _____           |

### **Do You?**

|   | <b>Rate</b> | <b>Comment</b> |
|---|-------------|----------------|
| _____ Meet / inform banker regularly?           | _____       | _____          |
| _____ Meet CPA regularly?                       | _____       | _____          |
| _____ Get monthly financial statement on time?  | _____       | _____          |
| _____ Have proper line of credit?               | _____       | _____          |
| _____ Keep on top of receivables?               | _____       | _____          |
| _____ Take advantage of payables?               | _____       | _____          |
| _____ Have a good system for projections?       | _____       | _____          |
| _____ Gen an annual certified audit?            | _____       | _____          |
| _____ Maintain adequate reserve for bad debt?   | _____       | _____          |
| _____ Foresee financial problems in the future? | _____       | _____          |
| _____ Have good insurance coverage?             | _____       | _____          |
| _____ Have good software?                       | _____       | _____          |

### **Profits**

% of Gross Margin is \_\_\_\_\_

\_\_\_\_\_ Prior yr.      \_\_\_\_\_ Prior yr.      \_\_\_\_\_ Prior yr.      \_\_\_\_\_ Next yr. proj.

% of Profit Current Year \_\_\_\_\_

Your profit compared to industry is \_\_\_\_\_

Compare your return on investment to industry \_\_\_\_\_

### **Stock**

Ownership breakdown? \_\_\_\_\_

Buy / Sell agreements? \_\_\_\_\_

Considered merger / acquisition \_\_\_\_\_

Legal matters you are most concerned about? \_\_\_\_\_

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***PRODUCTION / DISTRIBUTION***

| Key Products | % Company Sales | Rate Quality |
|--------------|-----------------|--------------|
| 1. _____     | _____           | _____        |
| 2. _____     | _____           | _____        |
| 3. _____     | _____           | _____        |
| 4. _____     | _____           | _____        |
| 5. _____     | _____           | _____        |

### Manufacturing

| Rate                        | Comments |
|-----------------------------|----------|
| _____ Quality               | _____    |
| _____ Design / Engineering  | _____    |
| _____ Productivity          | _____    |
| _____ Teamwork              | _____    |
| _____ Job Completed on Time | _____    |

### Shipping

| Rate                   | Comments |
|------------------------|----------|
| _____ Cost             | _____    |
| _____ On Time Delivery | _____    |
| _____ Packing          | _____    |
| _____ Storage          | _____    |
| _____ Productivity     | _____    |
| _____ Value            | _____    |

Key concerns / areas to improve \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Member: \_\_\_\_\_

Date: \_\_\_\_\_

***SWOT ANALYSIS***  
(To be completed by each Key person)

**Strengths**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Opportunities**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Weaknesses**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Threats**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Personal Conclusions \_\_\_\_\_

\_\_\_\_\_

Recommended Changes \_\_\_\_\_

\_\_\_\_\_

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***MINISTRY PLAN FOR BUSINESS***

Previous Year

Top Five Ministries Supported

| Company Financial Giving<br>Budgeted to Ministry | Amount |
|--|--------|
| 1. _____   | _____  |
| 2. _____   | _____  |
| 3. _____   | _____  |
| 4. _____   | _____  |
| 5. _____   | _____  |

Total Amount Given to all Ministries \$ \_\_\_\_\_

| Time Shared by Company Executives<br>and/or to Ministries to Employees | Amount<br>Day or Week |
|--|-----------------------|
| 1. _____   | _____                 |
| 2. _____   | _____                 |
| 3. _____   | _____                 |
| 4. _____   | _____                 |
| 5. _____   | _____                 |

Total Time Given to all Ministries \_\_\_\_\_

This Year's Goal

Mission Statement for Giving \_\_\_\_\_

| Top Five needs / goals to help | Budget by Company<br>And Sources | Employee<br>Contribution |
|--------------------------------|----------------------------------|--------------------------|
| 1. _____                       | _____                            | _____                    |
| 2. _____                       | _____                            | _____                    |
| 3. _____                       | _____                            | _____                    |
| 4. _____                       | _____                            | _____                    |
| 5. _____                       | _____                            | _____                    |

Plans for projected revenue \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***ROLE OF CEO***

### **How do you spend your time?**

| <b>Methods</b>    | <b>% of Use</b> | <b>Desired %</b> | <b>Comments (IN Business or ON Business)</b> |
|-------------------|-----------------|------------------|--|
| Meetings          | _____           | _____            | _____  |
| Telephone         | _____           | _____            | _____  |
| Computer          | _____           | _____            | _____  |
| Delegating        | _____           | _____            | _____  |
| Planning          | _____           | _____            | _____  |
| Report Review     | _____           | _____            | _____  |
| Praising People   | _____           | _____            | _____  |
| Community         | _____           | _____            | _____  |
| Selling           | _____           | _____            | _____  |
| Secretary         | _____           | _____            | _____  |
| Bible Study       | _____           | _____            | _____  |
| Personal Ministry | _____           | _____            | _____  |

### **Who could succeed you?**

#### **Key Areas of Strength**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

#### **Comments**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

#### **Key Areas for Improvements**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

#### **Comments**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### **List activities top priority use of your time/ your role**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***PERSONAL EXIT STRATEGY OF CEO***

(For CEO Only)

When: \_\_\_\_\_

\_\_\_\_\_

How: \_\_\_\_\_

\_\_\_\_\_

Why: \_\_\_\_\_

\_\_\_\_\_

Plans to accomplish / Time frame: \_\_\_\_\_

\_\_\_\_\_

Staff Needs / Changes: \_\_\_\_\_

\_\_\_\_\_

Resources Needed: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Key changes to set in motion this year: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***CORPORATE GOAL***

| Last year (5 to 1) | Comments |              |          |
|--------------------|----------|--------------|----------|
|                    | Rate     | Compliance % | Comments |
| Strategic Plan     | _____    | _____        | _____    |
| Marketing Plan     | _____    | _____        | _____    |
| Cash Flow Plan     | _____    | _____        | _____    |
| CEO Vision         | _____    | _____        | _____    |
| Dept. Budgets      | _____    | _____        | _____    |

| Corporate Goals | Measured By | Deadline |
|-----------------|-------------|----------|
| 1. _____        | _____       | _____    |
| 2. _____        | _____       | _____    |
| 3. _____        | _____       | _____    |
| 4. _____        | _____       | _____    |
| 5. _____        | _____       | _____    |

### Barriers in achieving goals

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Goals Communication with people / feedback systems

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Goals changes you would like to make

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Member: \_\_\_\_\_

Date: \_\_\_\_\_

## ***BOTTOM LINE***

What you are most concerned about and want to see accomplished?

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_
6. \_\_\_\_\_  
\_\_\_\_\_

List Key Indicator for health of your business!

- |    | Business  | Goal / Measure |
|----|-----------|----------------|
| 1. | _____     | _____          |
| 2. | _____     | _____          |
| 3. | _____     | _____          |
|    | Character |                |
| 4. | _____     | _____          |
|    | Moral     |                |
| 5. | _____     | _____          |
|    | Spiritual |                |
| 6. | _____     | _____          |

**UNDERSTANDING THE FINE DISTINCTIONS  
 VISION – MISSION – PURPOSE – STRATEGY – GOALS**

| STEPS FROM VISION TO RESULT   | WHAT IT IS  | RAISES THE QUESTION   | UNDERSTANDING THE GAME – OR HOW THE MIND BEST RELATES TO ALL THIS   |
|---|---|---|---|
| <p align="center">Idea / Flash</p> <p align="center"><b>VISION</b></p>  | <p>A picture or idea created in the imagination.</p> <p>The emergence of possibility; of what is, or could be available.</p> <p>When you articulate and communicate a vision, you create a purpose and something alive is born into the world.</p>  | <p>What do I/we want to experience or actualize?</p>  | <p align="center"><b>CONTEXT OR PARADIGM</b></p> <p align="center">Vision, purpose and intended results are the guiding light of effective leadership</p> <p align="center"><b>INFINITE GAMES:</b></p> <p align="center">Not restricted by Right-brain<br/>                     boundaries<br/>                     rules, time, Non-linear<br/>                     nor process.<br/> <u>Being</u></p> <p align="center">Master plan</p> <p align="center">Blueprint or<br/>                     Pattern</p> |
| <p align="center"><b>PURPOSE</b></p> <p align="center">Sometimes called<br/>                     Mission</p>  | <p>Brings the vision into existence – clarifies it.</p> <p>Captures people’s imagination.</p> <p>Describes the raison o’etre-the reason for being, for existence of the person, project, group or organization.</p> <p>Charts the course...provides something to navigate by in bringing vision into reality.</p> <p>Represents the “Guiding Light.”<br/>                     When infused with commitment and positive energy, it creates team spirit which enriches the life and power of the vision.</p> | <p>What am I here for?</p> <p>What do I stand for?</p> <p>What are we here for?</p> <p>What do we ask for?</p> <p>What is this company / organization here for?</p> <p>Are purpose in life and organizational purpose integrated?</p> |   |
| <p align="center"><b>INTENDED RESULTS</b></p> <p align="center">Sometimes called<br/>                     Strategy, Philosophy or<br/>                     Values</p> | <p>Expands on and personalizes the meaning of the purpose.</p> <p>Describes more specifically what the purpose looks like as a finished product.</p> <p>Provides a measurement for comparison to current reality, and for guiding progress along the way to realization of the vision.</p> <p>Provides a foundation on which to build projects.</p>   | <p>What does this purpose really mean?</p> <p>What do I/we want to produce out of this purpose?</p> <p>What projects are needed to have these results become real?</p>  |   |

**UNDERSTANDING THE FINE DISTINCTIONS  
 VISION – MISSION – PURPOSE – STRATEGY – GOALS**

| STEPS FROM VISION TO RESULT | WHAT IT IS  | RAISES THE QUESTION   | UNDERSTANDING THE GAME – OR HOW THE MIND BEST RELATES TO ALL THIS  |
|-----------------------------|---|---|--|
| <b>PROJECTS</b>             | <p>A specific plan or design for bringing one or more intended results into existence.</p> <p>A job, task or undertaking by one or more persons.</p> <p>The means of manifesting vision/purpose.</p> <p>Purpose and intended results are used as the guidance system.</p> <p>When project is off-course, team members confront readily, and in a positive manner, bring resolution and corrections.</p> | <p>How does the project embody the purpose?</p> <p>Are the project teams resources established and managed based on purpose?</p> <p>Is there clarity, focus, commitment and alignment on the common purpose?</p>  | <p align="center"><b>CONTENT AND PROCESS</b></p> <p align="center">Projects, goals and objectives are powerful tools for effective management.</p> <p><b>FINITE GAMES:</b></p> <p>Have a beginning and end with specific time limits played within boundaries and within rules.</p> <p>Left-brain<br/>                     Linear<br/>                     Doing</p> <p>Creating, developing, building the product</p> <p>Specific measurable feedback on results.</p> <p>Manifesting the intended results</p> <p>Played within the Infinite game or Purpose.</p> <p>Making it real.</p> <p>-----</p> <p>Note: this table is designed to facilitate understanding.</p> |
| <b>GOALS</b>                | <p>Delineates the paths, ways and means by – which a project will be completed.</p> <p>Provides the elements by which the project can be worked on, guided and managed.</p> <p>All goals should be personally important to the team members.</p> <p>Defines responsibilities of a job, sets objectives for each responsibility, and establishes indicators for measuring progress.</p>                  | <ul style="list-style-type: none"> <li>- Where are we going with the project?</li> <li>- Is it realistic?</li> <li>- Is it understandable and specific?</li> <li>- Can you measure progress?</li> <li>- Is it related to actions which can be performed?</li> <li>- Does it have a time limit?</li> <li>- Is it written?</li> <li>- Is it compatible with other goals, projects and purpose?</li> <li>- Is it acceptable to all parties involved?</li> <li>- Are you prepared to keep it up to date?</li> <li>- Does it have build in feedback?</li> <li>- What are the rewards?</li> </ul> |  |
| <b>OBJECTIVES</b>           | <p>Describes what you have to do to get the project off the ground.</p> <p>A specific, measurable result to be achieved within a certain time.</p> <p>A component of goals.</p> <p>It tells you what you are to do, how much work you must accomplish, and when that work must be finished.</p> <p>Break each responsibility down into objectives, identify indicators for each objective.</p>          | <ul style="list-style-type: none"> <li>- What needs to be accomplished?</li> <li>- How much of the work must I/we do?</li> <li>- How many tasks must be completed?</li> <li>- When must we finish each task?</li> <li>- Are there at least one or more milestone indicators for each objective?</li> <li>- Who is responsible for each objective?</li> </ul>  |  |