

Vision Planning

The business plan is dead! It's too slow, too rigid and out of date in a flash.

Vision Planning is the faster, cheaper alternative that helps you stay ahead of the pack and react to market changes quicker than your competitors. Vision Planning is a practical way of reviewing your business and setting a clear direction. It is also a great way of motivating your team and sharing your business vision for success.

A Vision Plan can be completed in a couple of weeks and is easily updated on a regular basis. There are four phases in the Vision Planning process, a briefing meeting, a facilitated planning workshop, the development of a plan and a debrief. Each project is tailored to suit you, your team and your business however you could project to include the following:

Briefing Session

The initial meeting with the business owner/s takes 1 – 2 hours and aims to identify the key issues the business is facing in 2007 and beyond. During the meeting we will decide on a format for the planning sessions and identify clear outcomes. You may need to do some preparation work prior to the Vision Planning Workshop. This may involve completing a Business Health Check questionnaire or analysis exercises such as calculating average spend per client group or ratios of expense items to revenue.

Vision Planning Workshop

The facilitated planning workshop can be held as a six hour session over one day or two shorter sessions held a week apart. The workshop can involve just the business owners or can be tailored to include key staff members or the whole team. Each workshop will be developed specifically for your business but you could expect the workshop to include:

- ▶ An overview of the Vision Planning process and expected outcomes (15 minutes)
- ▶ An overview of how growth (and change) may affect the business and individuals e.g. different attitudes to change(15 minutes)
- ▶ Discussion to identify the reasons for growth (15 minutes)
- ▶ Discussion to identify the barriers to growth (15 minutes)
- ▶ Development of a vision for the business. (1.5 hours) This includes:
 - Size of business
 - Turnover/profit
 - Location/premises
 - Core business
 - Product mix
 - Production
 - Planned markets
 - Existing markets
 - Staffing
 - Business owners role
 - Distribution channels
 - Image and branding
 - Awareness
 - Visibility

- Reputation
- Milestone achievements
- ▶ Review of the Vision to identify internal and external key issues (30 minutes)
- ▶ Development of a Growth Action Plan detailing what will need to change to achieve the vision. (2.5 hours) This will cover areas such as:
 - Research
 - Target markets
 - Product development
 - Pricing
 - Product mix
 - Packaging
 - Manufacturing or production systems
 - Suppliers
 - Order fulfillment systems
 - Delivery of product or service
 - Billing systems
 - Sales focus/systems
 - Customer service systems
 - Sales focus/approach
 - Marketing to target markets
 - Market positioning
 - Awareness
 - Staffing and Structure
 - Communications internal
 - Communications External
 - Management
- ▶ Discussion to identify people or organizations internally and externally who can help your business achieve the Vision
- ▶ Summary of the day and discussion of outcomes and next steps for implementation. (30 minutes)

The Vision Plan

During this part of the planning process strategies developed during the Vision Planning session are reviewed and alternatives suggested where they could be more cost effective or easier to implement. The information generated during the Vision Planning workshop is documented and a simple action plan created using a Gant Chart format. This can be used internally to assign tasks and monitor progress.

Debrief Session

A follow up meeting is held with the business owners to discuss outcomes of the planning workshop and discuss implementation or strategies that will need to be developed further.