



WHY CHOOSE BG FOR STRATEGIC PLANNING?

The reasons our clients choose Balanced Growth for Strategic Planning include:

1. Work collaboratively with the board, management, and key stakeholders to create a future-oriented and attainable plan.
2. Leverage a proven Strategic Planning Framework to guide the process.
3. Bring objectivity and expertise in the process of developing the best overall plan and creating alignment among key stakeholders.
4. Deliver the plan in a framework that is actionable and can be actively managed in the short-term and long-term.



STRATEGIC PLANNING APPROACH

BG uses a proven, four-phased approach for strategic planning: Discover, Design, Develop, and Deploy. BG customizes this approach to align with your organization's unique needs.



KEY MILESTONES

Strategic Planning Retreat

Complete the Discover phase to set the stage for the collaborative Design process (often in the form of a Strategic Planning Retreat) to cast vision, set goals and establish high-level priorities for the future.

Strategic Plan Development and Action Planning

Design and Develop the Strategic Plan deliverables including the Strategic Roadmap to depict the prioritization to operationalize the Strategy.

Socialize, Refine and Approve the Strategic Plan

Discuss and refine the strategy with the goal of achieving organizational alignment and obtaining approval to begin to Deploy the Strategic Plan.





KEY ACTIVITIES

Strategic Planning Retreat

The initial steps of the process are designed to understand the unique aspects of your organization and to unlock ideas for the future. This is followed by a collaborative process (often in the form of a Strategic Planning Retreat) to establish the framework for the future.

- **Analyze Background Information:** Review the strategic, financial, sales, customer, competitor, operational and organizational information that drives your organization.
- **Conduct Board, Executive and Stakeholder Interviews:** Gather input from board members, executives, and key leaders. This is extremely valuable to aggregate various leadership perspectives and determine the degree of alignment on strategic topics.
- **Facilitate the Strategic Planning Retreat:** Facilitated sessions are designed to cast vision, set goals and establish high-level priorities for the future.
- **Develop an Executive Summary from the Retreat**

Strategic Plan Development and Action Planning

- **Design and Develop the Strategic Plan:** Design and develop the Key Deliverables.
- **Strategic Roadmap:** Develop the Strategic Roadmap to depict the prioritization and sequencing to operationalize the Strategy.
- **Document a Draft of the Strategic Plan:** A draft version of the Strategic Plan is developed for discussion and refinement.

KEY DELIVERABLES

- Strategic Analysis
- Interview Findings
- S.W.O.T. Analysis
- Executive Summary of the Planning Retreat
- Strategy Map
- Measures and Targets
- Strategic Roadmap
- Strategic Plan Presentation



Socialize, Refine and Approve of the Strategic Plan

- **Socialize the Plan:** Conduct conference calls or meetings with key stakeholders to vet the draft plan, gather feedback, and refine the plan.
- **Align the Plan:** Align the plan with your budgetary and other planning processes.
- **Present & Request Approval:** Present a final version of the Strategic Plan and request necessary approvals to begin the deployment of the strategy.

Project Management

There is a continuous effort to manage the project efficiently and to work in collaboration with your project sponsor and steering committee.