

# Strategic Planning

*Moving from reactivity to intentional growth*



Collaboration

business consulting

# Collaboration Business Consulting



We are a team of trusted experts that has been helping local businesses thrive for nearly three decades.

Whether you're a business owner aiming for growth or a family-owned business navigating a transition, our support at every stage leads to meaningful results.

# The Why

*When you have a strategic plan, you gain:*

## **Direction**

On where you are  
trying to go

## **Clarity**

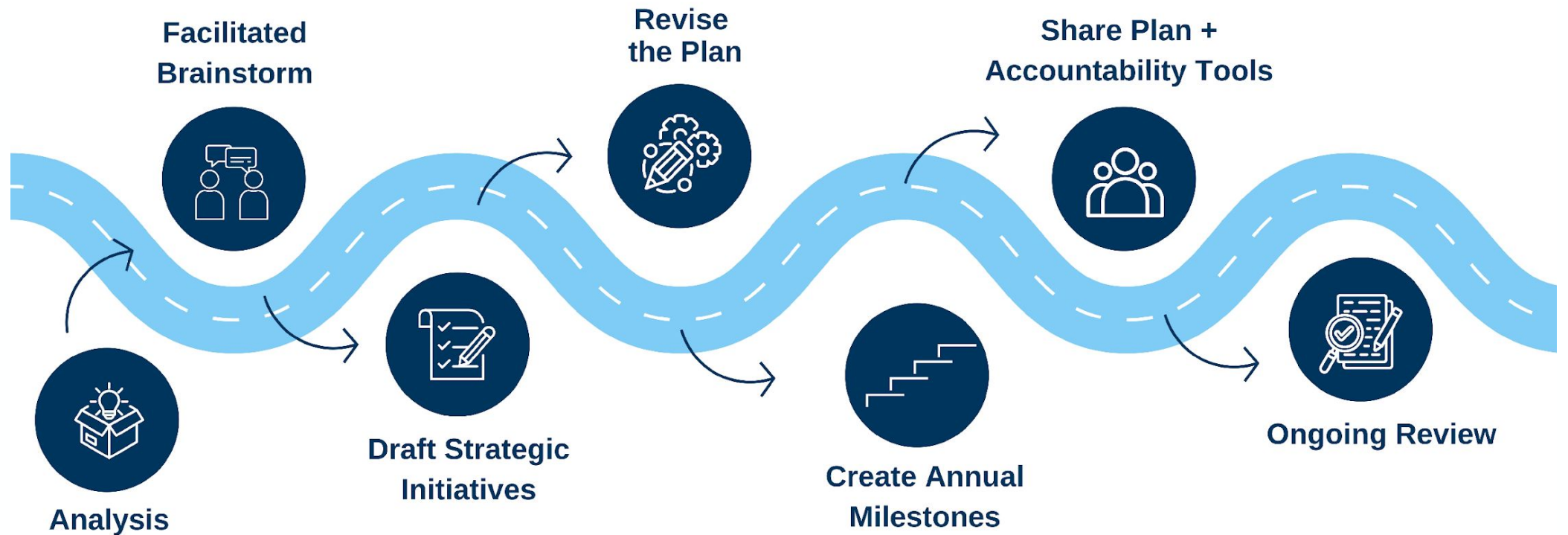
Of how to translate  
that vision into actions

## **Confidence**

To lead proactively,  
not reactively

# The Process

*Start to finish*



# The Process

## *Phase 1: Gather Information*

### Analysis

- Assess the current state of the organization
- Capture the owners' high-level vision and goals



### Facilitated Brainstorm

- Workshop with owners + key team members
- Surface common themes and priorities to shape initiatives

# Common Pitfalls

## *Phase 1: Gather Information*

### Analysis

- Not looking outside your organization
- Unintentional blind spots
- Owner(s) not clear or aligned

### Facilitated Brainstorm

- Too many people
- Involving mid-level managers/supervisors too soon



# The Process

## Phase 2: Plan Creation

### Create Annual Milestones

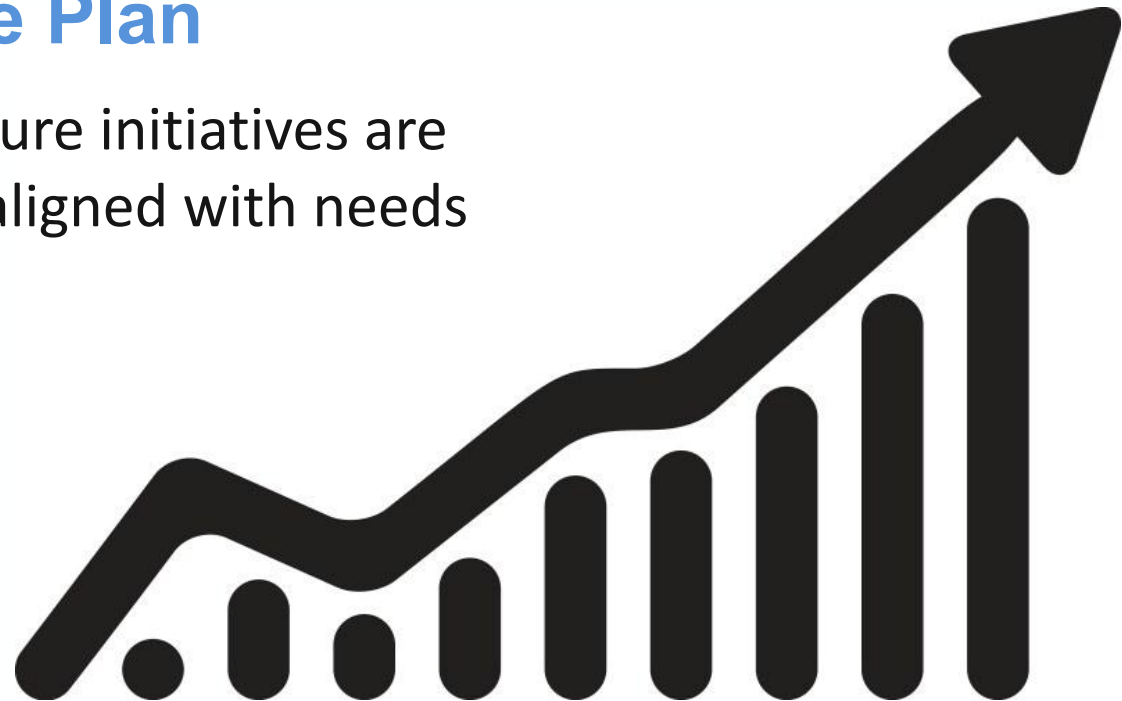
Break initiatives into progressive annual goals

### Revise the Plan

Iterate to ensure initiatives are realistic and aligned with needs

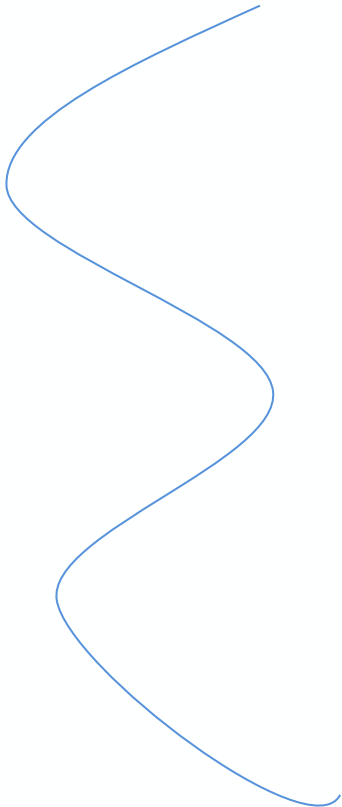
### Draft Initiatives

Draft by brainstorm themes from phase one



# The Process - Example

## Phase 2: Plan Creation



### Theme

Focus on our ideal clients

*\*Identified in  
brainstorm*

### Strategic Initiative

Identify the core client types we serve best and tailor our offerings to better meet their needs.

### 2025 Milestone

Analyze past projects to identify the top 3 client types that led to the most successful outcomes.

# The Process

## *Phase 3: Implementation*

### Share Plan & Tools

- Share the plan with the team + get buy in
- Create accountability tools to measure progress



### Ongoing Review

- Create monthly, quarterly + annual routines for review
- Adjust as needed to the plan to maintain feasibility

# Common Pitfalls

## *Phase 3: Implementation*

### Share Plan & Tools

- Rushing the process
- Sharing with employees before managers (or at the same time)
- Not following up in 1:1 or small group meetings



### Ongoing Review

- Create it and forget about it
- Letting short-term priorities (fires) take all the attention
- Adding more to the goals without reprioritizing
- Not breaking down goals into actionable next steps

# Questions?

# We're Collaboration. Your local business experts.

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*Scan to connect with us*

