

Strategic Planning Workout



No Pain, No Gain

Workout Plan

- Introduction to strategic planning
- Stretching routine
- Time to workout – 3 reps
 1. Goals and Objectives -30 min
 2. SWOT – 30 min
 3. Action Plans – 30 min
- Cool down

Why Strategic Planning?

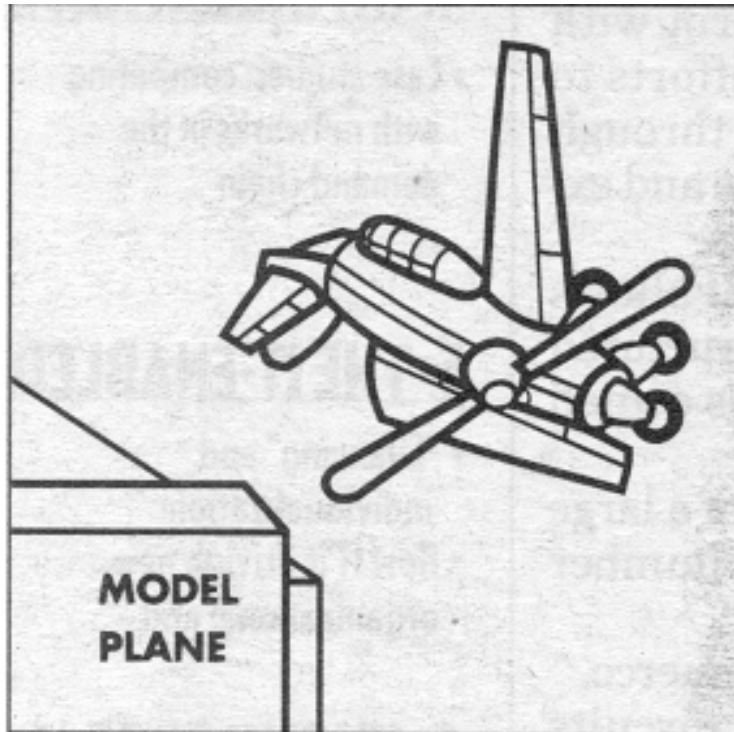
“If we don’t change direction, we might end up where we’re headed”

-author unknown

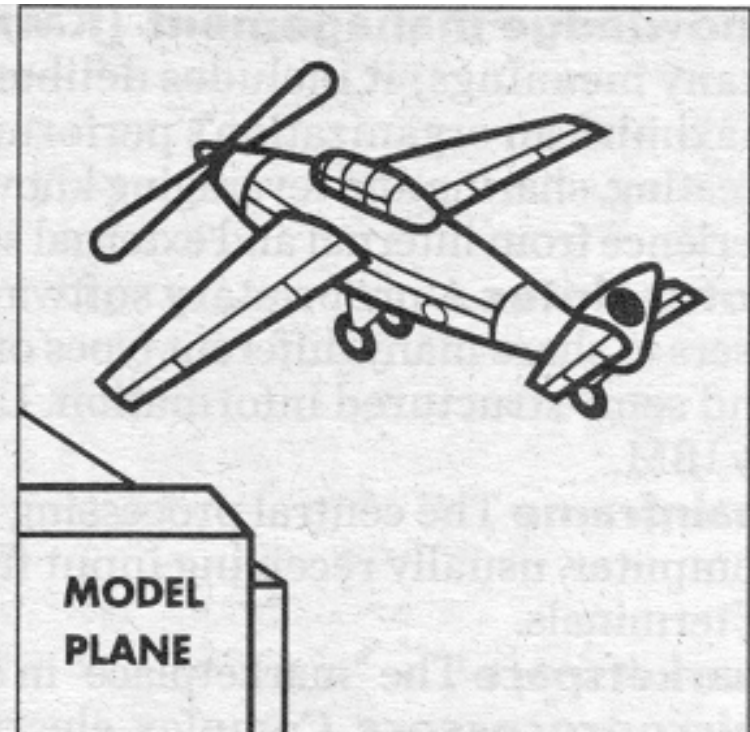


Importance of Planning

Without know-how, you won't know how!!



No Plan



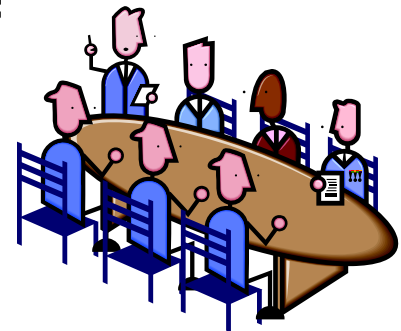
Plan

8 Steps to Strategic Planning

1. Establish a Strategic Planning Committee
2. Review Existing Plans
3. Define the Mission Statement
4. Define the Issues - SWOT
5. Establish Goals & Objectives
6. Develop Action Plans
7. Implement Plans & Evaluate Success
8. Start Next Year's Planning

Establish Strategic Planning Committee

- ❑ Chapter BOD
- ❑ Include past, present and future leaders
- ❑ Enlist a facilitator – region staff, local resource
- ❑ Enforce time limit, come prepared!



Review Existing Plan

- ❑ First 30 minutes dedicated to plan review
- ❑ Look for carry over items
- ❑ Identify success and failures
- ❑ If there was no plan develop Vision/Mission statement.



Develop a Mission Statement

- The Mission Statement is a broad description of what the organization does, with and for whom the organization does what it does, and WHY the organization exists (the ultimate end). Mission conveys a sense of “fundamental purpose.”

APICS Mission Statement

- “APICS builds knowledge and skills in operations management professionals to enhance and validate abilities and accelerate careers. We help our members and their organizations successfully compete and build a stronger global economy.”

GULF Chapter Mission (yr 2000)

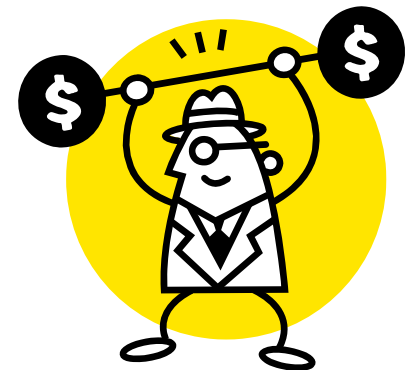
- "The mission of the Florida Gulf Chapter of APICS is to provide value to our membership by delivering education programs and offering opportunities for career development. Gulf Chapter will also support the local business and academic community by offering educational resources that will enhance the opportunity of increasing bottom line performance."

Define the Issues - SWOT

- Strengths
- Weaknesses
- Opportunities
- Threats

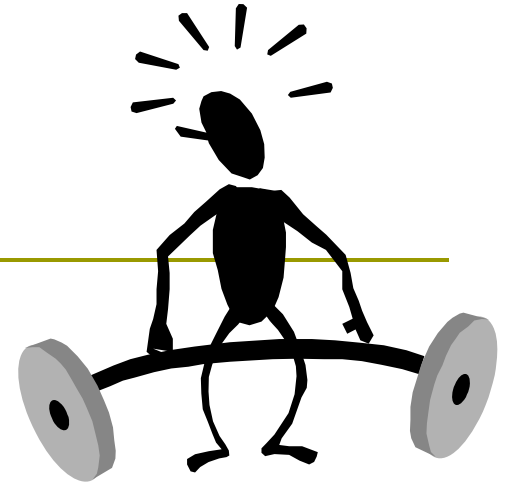
Strengths

- ❑ What is the chapter good at doing
- ❑ Special skills or resources
- ❑ Something that puts the chapter at a market advantage
- ❑ The chapter comfort zone



Weaknesses

- ❑ What does the chapter lack
- ❑ What does the chapter do poorly
- ❑ What puts the chapter at a disadvantage in achieving it's goals

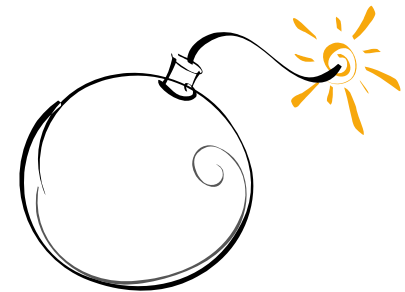


Opportunities

- ❑ What are the avenues to profitable growth
- ❑ What can the chapter exploit for competitive advantage
- ❑ What conditions exist that will allow the chapter to implement the Mission Statement.

Threats

- ❑ Internal factors that pose a threat to the goals of the chapter
- ❑ External factors that pose a threat to the goals of the chapter



Goals and Objectives



- Keep them simple and achievable
- Remember we are a volunteer organization
- Make sure G&O's are measurable
- Tell me in numbers, let the data do the talk'n

Develop Action Plans

- Implementation plan – identify actions
- Who will be accountable for action
- When will we know action plan is complete
- Record progress throughout the implementation until completed

Implement Plans and Evaluate

- Plan, Do, Review
- Are you contributing to the “Mission”?



Start Next Years Planning

- ❑ Some action plans will carry over
- ❑ Some action plans may reoccur
- ❑ Some actions will just have to wait

How to Start

- ❑ Determine participants
- ❑ Set meeting date, time and length
- ❑ Don't recreate the "wheel" use existing formats, useful examples, have templates ready
- ❑ Find a facilitator so you can participate fully



Format Examples





Strategic Plan 2006-2007

The Mission Statement

The mission of the Florida Gulf Coast Chapter of APICS is to provide value to our membership by delivering education programs and offering opportunities for career development. The Gulf Coast Chapter will also support the local business and academic community by offering educational resources that will enhance the opportunity of increasing bottom line performance.

Demographics

Our chapter's territory covers the west coast of Florida between Bradenton and Naples and includes approximately 100 members. There are over 800 manufacturing businesses in the territory with over 90% of the businesses employing 50 people or less. The type of manufacturing is very diverse and includes food processing, electronics, building products, light industrial, equipment manufacturing, automotive, medical device, and aerospace.

Strengths

Our chapter's board of directors has remained strong over the past few years so the organization has been well managed and financially stable. The Board members have maintained some consistency so the knowledge base has been passed on to new Board members.

We have strong educational programs and have formed partnerships with Manatee Community College and Quality Management Systems consulting services in order to deliver consistent course schedules and instruction. *We intend to expand relationships with Florida Gulf Coast University in Fort Myers and St. Petersburg College.* We have partnered with the APICS Florida West Coast chapter, SAMA and SME to hold joint meetings, share speaker expenses, and expand our avenues for marketing our services.

The number of businesses locating in our territory continues to increase, and this creates a growing market for our chapter's educational offerings in the field of resource management.

Opportunities

The single most critical issue is to increase interest in our organization and attract new companies to participate in our educational programs. We need to survey and analyze our current and potential members to understand their expectations, where they reside, and where they work. This information will help us determine what educational courses and Professional Development Meetings the chapter should be offering and where they should be offered.

We need to expand our offerings to non-manufacturing organizations that experience similar Supply Chain requirements, such as hospitals, food banks, agricultural distributors, and other inventory-constrained entities.

Strategic Action Plan

Area: Membership

Status	Strategic Activity	Responsibility	Due Date
	<p>What: Initiate Company Coordinator Program</p> <p>Who: Gene Soltis</p> <p>When: October, 2000</p> <p>Goal: Initiate Company Coordinator Program with 5 company coordinators.</p> <p>Action Steps:</p>		
Complete	1. Develop outline of company coordinators responsibilities.	Tina	September
Complete	2. Analyze membership rolls to identify companies with multiple APICS members.	Tina	September
Complete	3. Identify target candidates for company coordinator position.	Gene S	September
Complete	4. Contact candidates to recruit.	Gene S	October
HOLD	5. Post company coordinators in newsletter and announce at meeting.	Gene S	October
HOLD	6. Develop material to send to coordinators about PDMs, CPIM classes and plant tours.	Gene S	October

APICS Chapter Strategic Scorecard

2007

Date Revised: September 15, 2007

Goals and Objectives		Monthly Results					caution		on track		off plan		
		J	F	M	A	M	J	J	A	S	O	N	D
Linkage	1	Understand and respond to market needs											
	2	Develop and deliver additional ed. Offerings											
	3	Create alliances with other professional orgs											
	4	Ensure chapter volunteers are recognized											
	5	Submit Cbar and earn Gold status											
	6												

Supporting Action Plans		meas.	Monthly Results					caution		on track		off plan		
			J	F	M	A	M	J	J	A	S	O	N	D
1	offer programs other than just CPIM education													
2	Initiate company coordinator program													
3	schedule joint meetings with ISM, BAMA, WHMA													
4	Formalize and implement chapter marketing plan													
5	implement volunteer spotlight to newsletter													
6														

1	2	3	4	5	6
x	x			x	
x				x	
		x		x	
x				x	
			x	x	

Project complete
on track off plan

Where to get extensive sample

- APICS.org follow menu options below
 - Membership
 - Volunteer Resources
 - Chapter Management
 - Tools/Samples
 - Sample Chapter Strategic Plan

You will now be assigned a team

Team #1	Team #2	Team #3
CSRA	BAMA	ATLA
NCFL	CEGA	FLWC
FLSE	JACK	GULF
TNVL	NEAL	MDFL
	NWOR	PURI
	SPAC	

Goooooooooals and Objectives

- Create 10 Goals and Objectives
 - Work as a group and as ONE chapter
 - Record your work
 - Work with your facilitator



Let's Exercise the SWOT out of YOU

- ❑ Do a complete SWOT based on your experience as chapter leaders, from your perspective
- ❑ 8 entries for each, no more than 10
- ❑ Record your work
- ❑ Work with your facilitator

Action Plans to a Healthy Chapter

- Create 2 Action Plans using template
- Action plans should support G&O's and address SWOT

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