

Planning Summary Worksheet

- 1 - Identity**
- 2 - Purpose**
- 3 - Goals**
- 4 - Strategy**

- 5 - Process**
- 6 - Technology**
- 7 - Outcomes**
- 8 - Evaluation**

This Planning Worksheet is designed to assist in answering key questions about your business to help build a solid reference document that will support business planning.

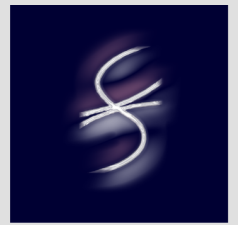
It will also help you to gain perspective about what it is you need to aim for and how this might be achieved.

More important than the planning itself is the discussion and actions that it generates. Small, simple steps are the order of the day.

A well-considered plan is most useful when it is reviewed at a later date and revised for further planning.

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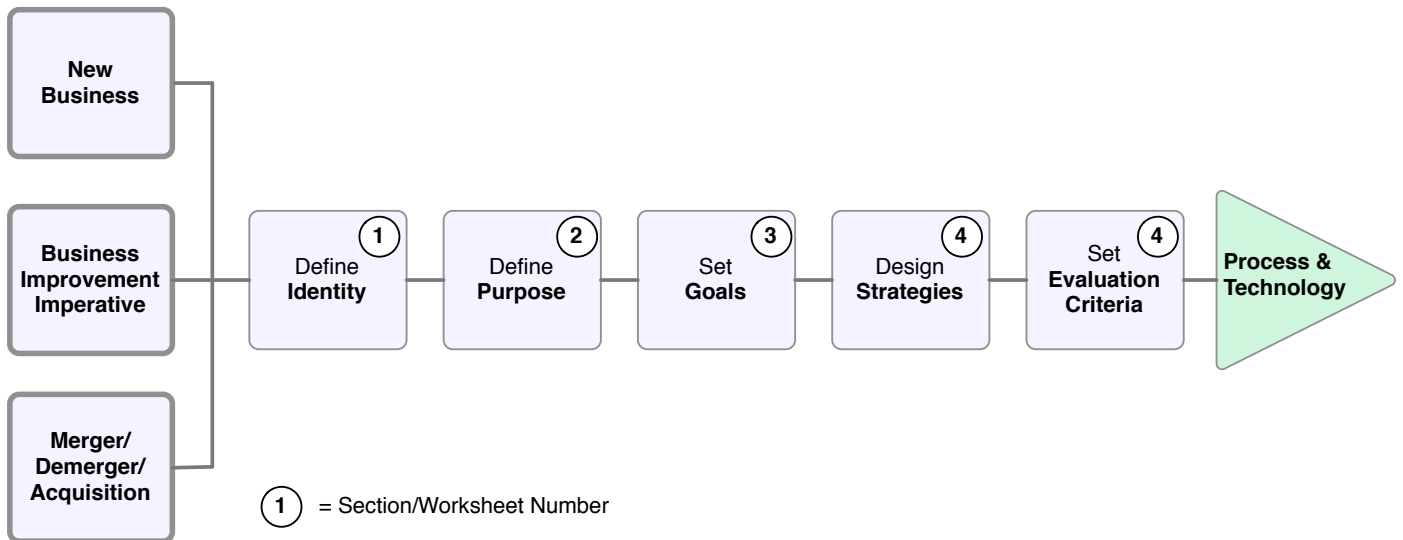
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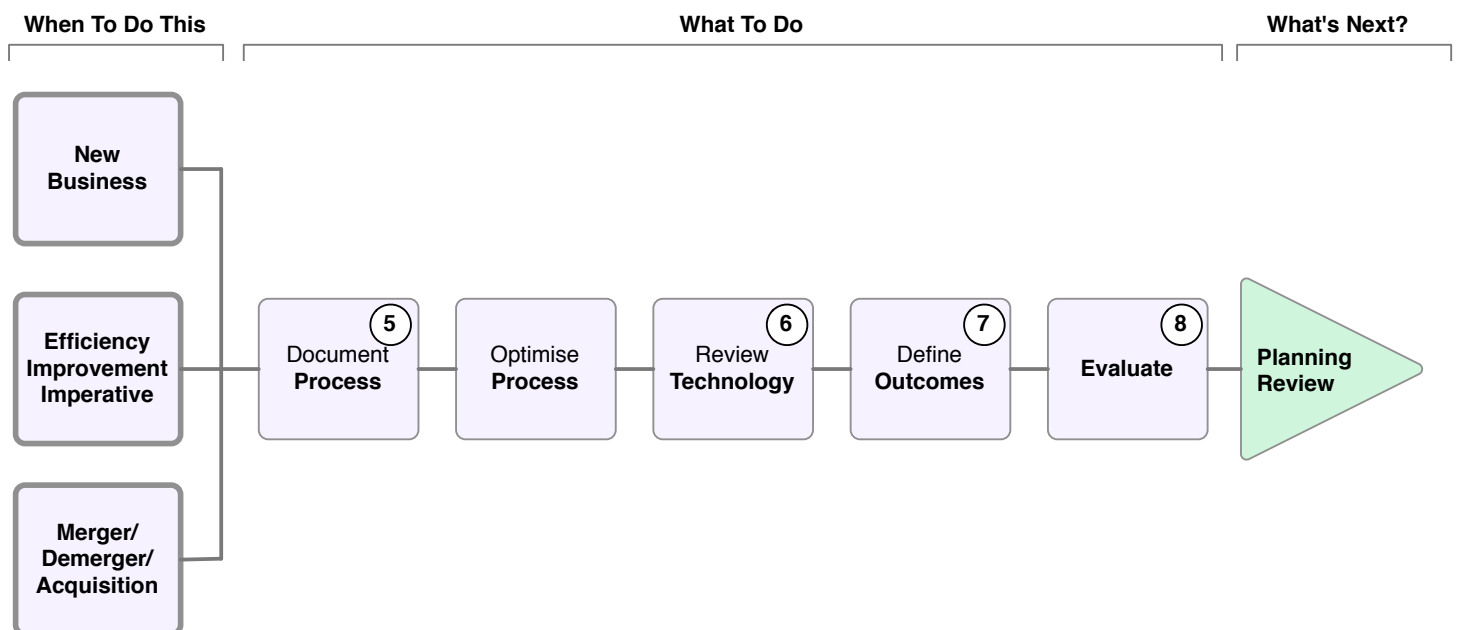
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Business Planning Workflow

identity, Purpose, Goals, Strategy



Process, Technology, Outcomes, Evaluation



<p style="writing-mode: vertical-rl; transform: rotate(180deg);">1 Identity</p>	<p>What Makes Us Who We Are?</p> <p>Who are you?</p> <p>Who are your staff?</p> <p>Who are your clients?</p> <p>Where have you come from?</p>	<p><i>Enter here:</i></p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">2 Purpose</p>	<p>Why are we here?</p> <p>"Mission Statement."</p> <p><i>Example:</i> <i>"To be the world's leading sports and fitness company"</i> <i>- Nike</i></p>	<p><i>Enter here:</i></p>

<h3>3 Goals</h3>	<p>What do we want to achieve?</p> <p>Goals provide the target for your Strategies. Early goal planning should be voluminous and may result in conflicting goals - these can be resolved later.</p>	<p>Comprehensive: Enter from Goals Worksheet [3] all Goals marked "Achieve:"</p> <p>Fast Track: Enter up to 5 Business Goals here:</p>
<h3>4 Strategy</h3>	<p>How do we get there?</p> <p>For each goals set, detail what methods you are going to use to towards them.</p> <p>How will you know if they are working?</p> <p>At what point will you change your methods if they're not?</p>	<p>Comprehensive: Enter from Strategies from Strategies Worksheet [4]:</p> <p>Fast Track: Enter 1 Strategy for each Goal above:</p>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">5 Process</p>	<p>How do we get things done?</p> <p>What are the steps that are taken to achieve business outcomes?</p> <p>This is detailed breakdown that should involve constant revision and optimisation as necessary.</p>	<p><i>List of Process Names from Process Worksheets [5]</i></p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">6 Technology</p>	<p>What are the tools of our trade?</p> <p>What equipment do you use in the course of business?</p> <p>How do you ensure that the equipment is appropriate?</p> <p>How do you select, install and maintain this equipment?</p> <p>How do you protect it?</p> <p>What happens if it becomes unavailable?</p>	<p><i>Refer to Organisation and Technology Questionnaire [6]</i></p>

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">7 Outcomes</p>	<p>What do we expect to happen?</p> <p>What are the changes you expect to see as a result of the planning process?</p> <p>How will you review them?</p> <p>What will you do when outcomes are met?</p> <p>What will you do when outcomes are not met?</p>	<p><i>Enter here:</i></p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">8 Evaluation</p>	<p>How are we going?</p> <p>When will you check the business against this plan?</p> <p>Are you on track?</p> <p>If not, why not? What approaches can be made to improve the situation?</p> <p>When will this plan be revised next?</p>	<p><i>Enter here:</i></p>