

BACKGROUND INFORMATION

You are the manager of a strategic business unit of a growing financial services firm. The CEO recently contacted you and the other unit- and corporate-level managers about a new strategic planning initiative.

To avoid some of the problems associated with centralized strategic planning, the CEO wants to open up the process and maximize the involvement of people at all levels. Although strategic planning will begin at the corporate level, he wants the development

have been printed on a set of cards (*Challenge Cards*), which are located on the perforated page attached to this booklet. You can separate these cards and rearrange them to try out different sequences. After the activities are placed in the proper order, the step-by-step process will be followed by members of the various strategic planning committees within the organization.

DEVELOPING YOUR INDIVIDUAL SOLUTION

Review the activities that appear on the next page and on the *Challenge Cards*.



Strategic Planning Challenge™ Participant's Booklet Page Sample

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Activities	
A	OPERATING CULTURES: Define operating cultures (norms and “ways of doing things”) for the units that would support their competitive strategies and, at the same time, tie them to the corporate mission, philosophy, and strategy for growth.
B	DEVIATIONS AND CORRECTIONS: Develop guidelines for modifying strategies, programs, systems, and structures in response to deviations or shortcomings identified by the control and measurement systems.
C	ORGANIZATIONAL MISSION: Define the organization’s mission or purpose, specifying <i>who our customers are, what businesses we are in, and what businesses we should get into?</i> —based on existing resources and special competencies.
D	STRENGTHS/WEAKNESSES: Analyze internal factors and delineate business unit strengths and weaknesses—in such

Strategic Planning Challenge™

Participant’s Booklet

Page Sample

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(1)
Your
Individual
Solution

(2)
Your
Team's
Solution

(3)
The
Recommended
Solution

(4)
Difference
Between
Columns 1 and 3

(5)
Difference
Between
Columns 2 and 3

A					
B					
C					
D					

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