

Situation Analysis Worksheet

Objectives:

- Recognize competitive advantages & disadvantages
- Exploit market opportunities, company strengths & competitor weaknesses
- Manage market threats and company weaknesses
- Anticipate competitor's actions and market trends
- First brainstorm, then prioritize

Internal Assessment

Strengths

Weaknesses

External Assessment

Opportunities

Threats

Strategy (MOST) Worksheet

Discuss as a Team:

- **Mission/Vision** – the organization’s purpose and reason for being.
- **Objectives** – qualitative statements describing what the business is trying to achieve.
- **Goals** – represent how success will be quantitatively measured for each objective. Stephen Covey suggested that goals should be worded as “from x to y by z”.
- **Strategies** – what the business will do (the main actions or projects) to achieve the objectives.
- **Tactics** – specific actions needed to accomplish each strategy.



Mission:

Objective 1:

Objective 2:

Objective 3:

Goal:
(lag measure)

Goal:
(lag measure)

Goal:
(lag measure)

Strategy 1

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 2

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 3

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 1

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 2

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 3

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 1

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 2

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 3

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Action Planning Worksheet

Covey's Four Disciplines of Execution

- **Focus** on the wildly important goal - WIG (because of whirlwind, lag measure, from x to y by z)
- **Act** on the lead measures (levers you can influence)
- Keep a compelling/fun **scoreboard** (of lag and lead measures)
- Hold each other **accountable** (weekly review/commitments)

Objective:

Goals:
(lag measures)

Strategy 1

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 2

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 3

Lead Measures: ____

Tactic 1:
Tactic 2:
Tactic 3:

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Objective:

Improve sales.

Improve inventory processing

Increase our Customer Sat Scores

Reduce Safety Incidents

From \$10mm to \$12mm by 12/31

From eight to ten by 12/31

From 55 to 80 by 12/31

From 7% to 1% by 12/31

Goals: (lag measures)



Strategy 1

Attend Tradeshows

Lead Measures: _____ Measure: One show per Quarter

- ✓ ID and register for target shows
- ✓ Pre-mail attendees
- ✓ Develop marketing materials and messages unique to each show
- ✓ Follow-up with hot prospects

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 2

Increase Revenue per training event

Lead Measures: _____ Measure: From 20 -22 participants, from 2.0 to 2.2 average days per event

- ✓ Assist client with marketing to past participants
- ✓ Incorporate additional training objectives into the agenda
- ✓ Incorporate guest speakers
- ✓ Suggest Team-based attendance
- ✓ Incorporate Action Planning into agenda to drive ROI

Tactic 1:
Tactic 2:
Tactic 3:

Strategy 3

Increase demonstrations at Hot Prospects

Lead Measures: _____ Measure: 8 live demos to hot prospects this year

- ✓ Offer on-site demos to hot prospects, ensuring decision-maker is present
- ✓ Offer webex to all prospects to convert to hot prospects
- ✓ Monthly email to cold T&D leads offering Webinar to overview process

Tactic 1:
Tactic 2:
Tactic 3:

Action Planning Worksheet

Covey's Four Disciplines of Execution

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Objective:

Improve Health!

Goals:
(lag measures)

Lose 20 lbs by 12/31

Strategy 1

Reduce calories CONSUMED

Lead Measures: ____ Measure: less than 2000 calories per day

- Tactic 1: Find calorie counter
Tactic 2: Record each meal's items
Tactic 3: Stop at 2 glasses of wine
Buy smaller plates
Slow down!

Strategy 2

Increase calories BURNED

Lead Measures: ____ Measure: run 2x/week, lift 3x/week

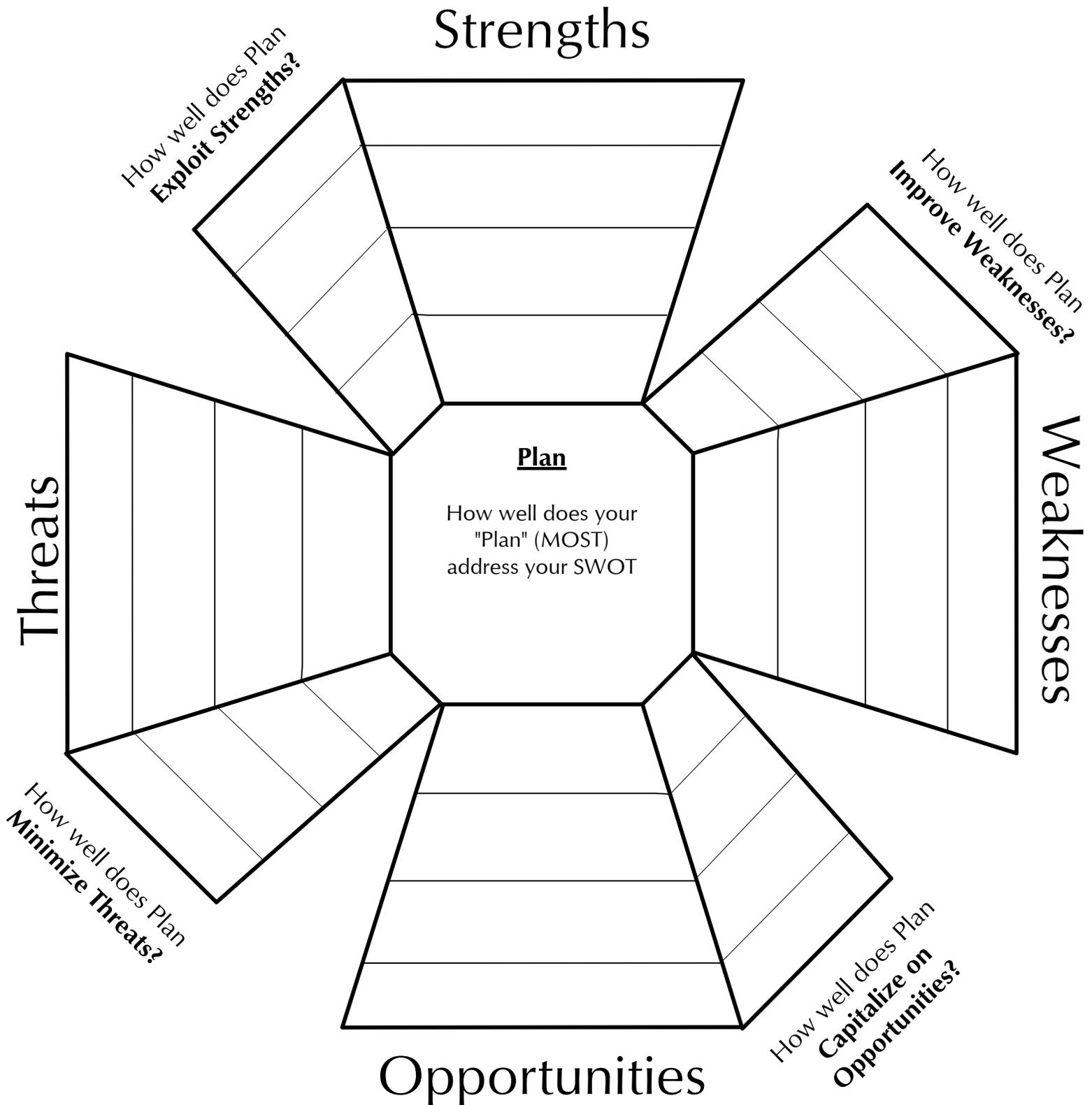
- Tactic 1: New running shoes
Tactic 2: Dumbbells in office
Tactic 3: Sign up for 3 races

Strategy 3

Lead Measures: ____

- Tactic 1:
Tactic 2:
Tactic 3:

Plan Assessment Worksheet



PriSim Business War Games (2016)
Hackbarth and Kettinger (2000)