

VALUE-BUILDING EXPERTISE

# STRATEGIC PLANNING

## INTRODUCTION

Strategic planning is essential for every business, big and small. With a focus on the future, it produces fundamental decisions that shape and guide what an organization is, who it serves, what it does, and why it does it.

Strategic planning is used to set priorities, focus resources, strengthen operations, and ensure that everyone is working towards common goals. It articulates where an organization is going, the actions needed to get there, and how it will know if it is successful.

When the unexpected happens, a strategic plan helps your business survive and find new opportunities while staying true to your mission.

## ABOUT RIZOLVE PARTNERS

Rizolve Partners is a strategic advisory firm that helps privately-owned businesses achieve peak value. We help businesses owners define the right path and take the right steps to realize optimal outcomes.

We guide private businesses on how to accelerate growth, drive value and position themselves for scalability, external investment and liquidity events. With the right plan, executed by the right team, it can be enjoyable and extremely rewarding.

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## PROBLEM

Strategic planning – the process of preparing a realistic vision for the future of your business, establishing goals, and determining the actions needed to achieve them – is a must to maximize the growth potential of your business. However, 90% of organizations fail to meet their strategic goals. The main reasons are:

- **Poor Communication:** 95% of employees don't understand their company's strategy or how their work contributes to the strategy.
- **Lack of Alignment:** Departmental goals and activities are not aligned with the strategy.
- **Insufficient Research:** Companies spend more time on internal issues (conflicts and budgets) than on analyzing important external information (threats and opportunities).
- **Unclear Priorities:** Companies try to do too much at once or fail to identify the activities that matter most.
- **Ineffective Tracking:** Companies do not follow through or have no organized, reliable way to track performance on a regular basis.



## SOLUTION

Implementing a dynamic Strategic Planning Process focused on:

### Context

- Developing a soaring vision and mid-to-long term goals to achieve that vision.
- Allocating sufficient time to get a clear view of market threats and opportunities.
- Identifying and prioritizing the actions that matter most to achieve strategic goals.

### People

- Focusing on both external and internal customer needs and wants.
- Engaging people broadly and deeply across the organization.
- Seeking diverse opinions to drive innovation and growth.

### Execution

- Breaking it down and connecting individual contributors to the outcomes.
- Evaluating performance progress on a regular basis to adapt and pivot as needed.
- Getting comfortable with tough decisions and calling out what you don't want to do.



## BENEFITS

Effective Strategic Planning provides many significant benefits to businesses of all sizes and levels of maturity, including:

- A long-term view that prepares the company to initiate influence instead of just responding to situations.
- A shareable, adaptable roadmap to drive company-wide clarity, confidence, and a mechanism for continual improvement;
- Greater employee engagement with a stronger sense of ownership, accountability, and productivity.
- Improved resource allocation tied to key business priorities that drive value and growth.
- Transparent performance measurements that inform smarter decisions on a timely basis.
- Greater likelihood of achieving your strategic goals.

Let's talk about how Rizolve Partners can help you with a Strategic Planning Process to help you achieve your business goals.

DRIVING OPTIMAL VALUE FOR BUSINESS OWNERS.