

Strategic Planning for Business Success

Jeff Baierlein, Director, Viristar | Gap Year Association Conference | October 23, 2019

Where are you going?

How are you going to get there?

How will you know when you have arrived?

Purposes of Strategic Planning:

1. Clarify priorities and set direction to meet those priorities
2. Focus your efforts
3. Build consensus throughout the organization on who you are, where you're going

Steps



1. Prepare



2. Describe mission and vision



3. Identify strategic issues, or focus areas, through an assessment of the environment



4. For each issue, establish strategies, goals, objectives



5. Write the plan



6. Implement plan & monitor results



Amazing Gap Year, Inc.

Business Plan Table of Contents

- I. Executive Summary
- II. Organization Background
 - a. Mission
 - b. Vision
 - c. History
 - d. Program Areas
 - e. Service Lines
- III. Strategic Issues
 - a. Organizational Resilience
 - b. Customer Service Satisfaction
 - c. Social Justice & Environmental Sustainability
- IV. Strategies
 - a. Increase Resilience by Diversifying Service Lines
 - i. Goals
 - ii. Objectives
 - b. Improve Customer Satisfaction by Service Quality Improvement
 - i. Goals
 - ii. Objectives
 - c. Develop, Implement Socially Responsible Travel System
 - i. Goals
 - ii. Objectives
- V. Evaluation & Revision
- VI. Appendix I: Five-year Financial Projections
- VII. Appendix II: Stakeholders & Contributors

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Syllabus

SECTION I 9:30-11:30

1. Welcome, intro
2. Needs assessment/goals
3. Presentation 1: Anatomy of A Strategic Plan
4. Break
5. Voting Along the Line
6. Business Plan Case Study
7. Business Planning Specific Issue Small Group Discussion & Report-out
8. Read over Lunch: innovation article

SECTION II 1:00-2:30

9. Continue Small Group Activity from before lunch
10. Presentation 2: Pointers, Pitfalls, Resources & Examples
11. Activity: Business Innovation

SECTION III 3:00-4:30

12. Build a Business Plan