MADS 6612 FINAL PAPER Guidelines

TITLE PAGE (creative yet professional sounding title of your plan)

CONSULTANTS PROFILE

- Description of the Consulting group that's taking charge of the strategic planning
- Consulting group's logo and explanation
- Profile of consultants (with photos) and their fields of expertise
- Client list

COMPANY PROFILE

- Extensive history of the organization stemming from its beginnings, growth and maturity.
- Company reviews, awards, past struggles and successes.
- Product or services offered, market niche and company branding.
- Anything that could help introduce your client organization to the public
- Pictures to substantiate the narrative

CURRENT SITUATION

- What is the current situation of the company?
- What are its current market standing that warrants the need for strategic planning?
- What are the strengths and weaknesses of the organization (with reference to the elaborated factors as done in Worksheet 3C)? (Worksheet 4A)
- What are its threats and opportunities using PESTLE and Porte's model? (Worksheet 4B)
- Pictures here would greatly help you send your message across

THE PROPOSED STRATEGIC PLAN

1. The contract (Worksheet 1)
    - The consultant will present a "contract" between the consultants and the client organization
    - Photo of the contract signing be attached
    - Present the SPS, SPC, SPT and SPCC
2. Mission, Vision (Worksheet 3A)
    - Present the existing Vision and mission
    - If the client organization has none, present the ideals of the owner as revealed during the interview
3. Vision sketch (Worksheet 3C)
    - Present the grand vision of the owner
4. Mission, Vision Analysis (Worksheets 3A, 3B, and 3C)
    - Present the areas / points where the existing mission and vision and the vision sketch are the same and or differ
    - Propose a new mission and vision based on the vision sketch of the owner
5. Strategic Issues
    - List of strategic goals and issues that the consultants and/or owner have identified (Worksheets 5A and 5C)
    - Present a list of priorities that the consultants wish to address in the Strategic Plan and provide justifications
6. Action Plans
    - Detailed Actions Plans (Worksheet 6A, 6B and 6C)

- Each task in the action plan shall have its own set of detailed elaborations such as but not limited to blue prints, pictures, suppliers, quality of materials, prices, proposed contractors, and others

7. Summaries
   - Provide a summary of Documentary Financial Requirements of the entire plan (Worksheets 6D AND 6E)
8. Gantt Chart
   - Based on the list of tasks to be done, prepare a Gantt Chart that would serve as a dashboard guide of the SPS (Worksheet 6F)
9. Appendices
   - Present all evidences you have such as all worksheets, pictures during company visits, interviews, and consultant conferences

End

Congratulations

WORKSHEET 1 — Plan the Planning Process

Consulting Firm:	Abacus consultants
Client Organization:	Aurel systems
Contact Person:	
Contact Information:	

Question	The whole organization	A division or unit	Only internal stakeholders	A specific collaboration	A specific community
1. Whose Plan is it?	Board member				
2. What period of time will the plan cover?	3years				
3. What opportunities, challenges, issues, problems, or concerns do you hope to address with this plan?	Marketing, Sales, cust Service, Tech Support, Expanding the business in other Countrie				
	Senior Mgr.	Board Member	Staff person	External Stakeholder	Others
4. Who is sponsoring the strategic planning process (SPS)? Do they have the authority and power over resources and time?		✓			
5. Who is the strategic process champion (SPC)? Does s/he have the backing of the sponsors and the ability, resources, time and respect of the participants?	Haritha is the SPC. She worked as python programmer previously. other Participants have knowledge about programming and Support SPC, any-th she need them				
	Senior Mgr.	Board Member	Staff person	External Stakeholder	Others
6. Who will be on the strategic planning project team (SPT) or the coordinating committee (SPCC)?	✓		✓		B.A ✓
7. Who else should be involved in the development of the plan? Who should own and be committed to the plan when it is completed?	✓		✓	✓	
8. Who will be involved in the review / approval of the plan?	✓	✓			
9. Who are the audiences for the plan?	Customers, Employees				
10. What is the best way to engage participants in the strategic planning process? I.e. Telephone, face-to-face meetings, social media, etc.	Face to face meetings at regular intervals. Sending E-mails about steps of planning				

See reverse / page 2 for more questions

WORKSHEET 2 — Identification of Mandates

Consulting Firm:	Abacus Consultants
Client Organization:	aurel systems Inc.
Contact Person:	
Contact Information:	

1 . Identify Mandates:	Service Agreement	Sales tax Permit	Mission & Vision statements	org'n mandates	Security of Software
2 . Identify the source of each mandate (charter, policy, rules, laws, etc.) Who is dictating this mandate?	Federal				govt
3 . What are the key requirements for this mandate? i.e. funds					Experience
4 . How is this mandate evaluated? What are the performance criteria?					Testing
3 . Is the mandate still appropriate or is it out-of-date? Does it conflict with other mandates?					
5 . How does this mandate mandate impact our purpose and nature as an organization?					Commit to org'n goals & mission
6 . What impact does this mandate have on our future direction? How does it impact our use of resources?					Loss of trust
7 . What programs, services, and project areas are NOT ruled out by this mandate?					"
8 . How consistent it this mandate with our mission?	For any basic	business we	need these	mandates.	So....
9 . Does this mandate need to be changed or eliminated? How and why?	N/A.				

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

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service as

WORKSHEET 3A — Stakeholder Analysis

Consulting Firm:	
Client Organization:	
Contact Person:	
Contact Information:	

1	Identify Internal Stakeholders:	Employees	Board members				
2	What criteria are used by this stakeholder to assess our performance?						
3	How does this stakeholder rate our performance? (poor, average, good)						
4	How does this stakeholder affect us? How do we affect the stakeholder? What do we need from each other?	cooperation	Funding Trust				
5	How important is this stakeholder to us? Not at all, somewhat, extremely	Somewhat	Extremely				
6	What role, if any, should this stakeholder have in the strategic planning process?						
7	Identify External Stakeholders:	Customers	Share holders				
8	What criteria are used by this stakeholder to assess our performance?						
9	How does this stakeholder rate our performance? (poor, average, good)						
10	How does this stakeholder affect us? How do we affect the stakeholder? What do we need from each other?						
11	How important is this stakeholder to us? Not at all, somewhat, extremely						
12	What role, if any, should this stakeholder have in the strategic planning process?						

	1 - 12	13 - 24	25 - 40	41 - 60	Over 60
11 . How many hours should be devoted to the planning process?				✓	
12 . What role do you want or expect the students to play in the planning process?					
13 . For each of the following steps, indicate who is to be involved and when:	Senior Mgr.	Board Member	Staff person	External Stakeholder	Other
Clarify organizational mandates	✓				
Clarify Mission, Values and Vision		✓			
Internal Environment assessment			✓		
External Environment assessment				✓	
Identification of strategic issues	✓				✓
Strategy formation	✓		✓		✓
Strategy and plan review & adoption	✓	✓	✓		✓
Description of the organization's future	✓	✓			
Implementation of the plan	✓		✓		
Strategic planning reassessment	✓	✓			✓
14 . What resources will you need to complete the strategic planning effort?	Financial, manpower				
15 . How likely are key stakeholders to be willing to accept and implement the strategies proposed by this plan?					
16 . What criteria should be used to judge the effectiveness of this strategic planning process?					
17 . What criteria should be used to judge the effectiveness of this strategic plan?					

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

Position each stakeholder on the following Power vs. Interest grid

Interest	Low Power	High Power
	Subjects High interest / low power Potential goodwill ambassadors Employees	**Players** High interest / high powerHigh potential to affect strategic planning process and its Board members
Low	**Crowd** Minimal interest & power Could be allies if moved to "Subjects" customers	**Context Setters** Minimal interest but high power Could provide barriers to the strategic planning Share holders

Low Power High

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

Updating Software & debugging

WORKSHEET 3C — Vision Sketch - Preliminary Vision

Consulting Firm:
Client Organization:
Contact Person:
Contact Information:

	Mission or Role	People	Services	Structure	Processes	Use of Technology	Resources	Culture	External Legitimacy and support
1. Describe the organization as it is right now in terms of the areas listed									
2. What would you envision five years from now in the areas listed?									
3. Where do the gaps or misalignments occur?									
4. Draft a vison sketch of where you would like to be in 5 years given the above findings.									
5. How should this vision sketch be used to guide strategic planning? I.e. should it be used to help identify strategic issues, to guide strategy selection, to guide implementation, or in communications with stakeholders?									

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

WORKSHEET 3B	Mission and Values Analysis

Consulting Firm:	
Client Organization:	
Contact Person:	
Contact Information:	

Mission Statement Analysis

1 . What is our current mission? What does it say about who we are, what our purpose is, whom we serve and how we are unique?	
2 . What are the social and political needs we exist to fill? What social or political problems do we need to address?	
3 . What is our role in meeting these needs or solving these problems? How do we differ from other organizations?	
4 . What do we want to do to anticipate and respond to these needs or problems? What should we be doing that we are not already doing?	
5 . How should we respond to our stakeholders?	
6 . What is our philosophy?	
7 . Is our current mission outdated? How so?	

Values Analysis

8 . What are our Key Values?					
9 . Is this a desirable or good value? Or is it inappropriate?					
10 . Are there any additional values we would like to include or adopt?					
11 . Are there any conflicts among our values that need to be addressed?					
12 . What are the 5 most important values we want to embrace?					

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

WORKSHEET 4B	External Opportunities and Threats or Challenges

Consulting Firm:	
Client Organization:	
Contact Person:	
Contact Information:	

Opportunity	Description	Options for taking advantage of this opportunity
Example: The new federal budget has allocated additional funding for our services	*More money is being allocated for senior's housing (our cause)*	*Ensure that our mission, mandates and services align with the new funding mechanisms.*
Improving the marketing strategies.		
Improving the Quality of products ~~are~~ often		
Development of customer		

Threat / Challenge	Description	Options for overcoming this threat or challenge
Example: Societal changes dictate that in-store shopping is being replaced by on-line shopping	*Our non-profit dollar store is in jeopardy*	*Change our business model to embrace electronic shopping*
traffic Increase in [illegible] fm technology.		

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

WORKSHEET 4A	Internal Strengths and Weaknesses
Consulting Firm:	Abacus Consultants
Client Organization:	Aurel Systems.
Contact Person:	—
Contact Information:	—

Strength	Description	Options for preserving or enhancing this strength
Example: Highly skilled and motivated staff	*Staff are experienced and well-trained in their specializations*	*Maintain adequate compensation and rewards and continue training allowances*
Products are low in cost, high in ROI	Developed In-house & highly Skilled developers	updating Software & debugging testing,

Weakness	Description	Options for minimizing or overcoming this weakness
Example: Mission statement is not clear	*We do not state what we do better than any other organization*	*Develop a contemporary mission statement with input from stakeholders*
No flexible customer Service after hours	operates from 9 to 5 on business days	Hiring part-time employees on weekends
Slow introduction of new technology		

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See reverse for the Direct Approach

Direct Approach	Have each individual strategic plan member fill out the following form. Discuss the strategic issues as a group and agree on a master list of issues. (See worksheet 5B and 5C)							
Frame Strategic issue #1 as a question. *I.e. How do we respond to the XYZ policy?*	Marketing Strategies, No online presence, Not building own Profile							
	Strengths	Weaknesses	Opportunities	Threats / Challenges	Goals / Objectives	Mission	Mandates	Vision
Why is this an issue? How does it relate to the SWOT/C? How does it impact our ability to meet our mandates, fulfill our mission, and realize our vision?	good product	Not focusing on potential customers	Becoming Customer centric	New Softwares in market	Brand recognition			
What are the consequences of not addressing this issue?	Loss of sales. If ~~this~~ proper marketing is achieved then we can improve sales.							
Frame Strategic issue #2 as a question.								
	Strengths	Weaknesses	Opportunities	Threats / Challenges	Goals / Objectives	Mission	Mandates	Vision
Why is this an issue? How does it relate to the SWOT/C? How does it impact our ability to meet our mandates, fulfill our mission, and realize our vision?								
What are the consequences of not addressing this issue?								
Frame Strategic issue #3 as a question.								
	Strengths	Weaknesses	Opportunities	Threats / Challenges	Goals / Objectives	Mission	Mandates	Vision
Why is this an issue? How does it relate to the SWOT/C? How does it impact our ability to meet our mandates, fulfill our mission, and realize our vision?								
What are the consequences of not addressing this issue?								

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WORKSHEET 5A — Strategic Issue Identification

Consulting Firm:	
Client Organization:	
Contact Person:	
Contact Information:	

Choose one of the three approaches below to identify strategic issues:

Goals approach, Vision of Success approach, or Direct approach.

Goals Approach -	Review the organization's goals/objectives with the strategic planning team. Refer to previous strategic plan. Goals/objectives should be agreed upon by the strategic planning team, measurable, and specific enough to guide strategy development
Goal #1	Develop marketing strategies which in-turn improve sales.
Goal #2	
Goal #3	
Goal #4	
Goal #5	

Note: Strategic issues are now: What is the best way to achieve goal #1, goal #2, etc.?

Vision of Success Approach -	Refer to questions 3 and 4 of the vision sketch (form 3C) or have Board Chair or CEO articulate the vision.
Describe your organization's vision of an ideal future as it successfully fulfills its mission and mandates. See worksheet 3C)	
Where do the gaps or misalignments occur?	

Note: Strategic issues are now: How can we best achieve our vision of success by narrowing the gaps and correcting misalignments?

WORKSHEET 6A Strategy Formulation

Consulting Firm:	
Client Organization:	
Contact Person:	
Contact Information:	

Fill out this form for each strategic issue, goal, or vision identified in Sheet 5C

The strategic issue, goal, or vision is:						
1 . What are the practical alternatives, dreams, or visions we might pursue to address this issue, achieve this goal, or realize this idealized future scenario?						
2 . What are the **barriers** to these alternatives, dreams, or visions?						
3 . What major proposals might we pursue to achieve these alternatives, dreams, or visions?						
4 . What major actions must be taken within the next year or two to implement these major proposals? (Consider staff limitations).						
5 . What specific steps should be taken within the next 6 months to implement these changes and who should responsible?						
	Likelihood of commitment by stakeholders	Compatibility with Mission, Vision, Values	Financial feasibility	Technical feasibility	Risk (ethical, moral and	Others (specify)
7 . Evaluate the strategy based on the above criteria. (Poor / Average / Good)						
8 . If this strategy is still worth considering, taking into account all of the analysis, rearticulate it.						
9 . How can we combine this strategy with any other strategies, proposals, actions, or steps?						
10 . If this strategy contradicts or conflicts with another strategy, proposal, actions or initiative, what can be done?						
11 . What resources are we or our sponsors willing to commit to this strategy over the next two years?						

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

WORKSHEET 5B	Operational vs. Strategic Issues

Consulting Firm:
Client Organization:
Contact Person:
Contact Information:

Issue

* *Fill out one form for each issue*

	Operational	<------------->	Strategic
1 . Would this issue make it onto the agenda of our policy board?	No		Yes
2 . Is or should this issue be on the agenda of the chief executive?	No		Yes
3 . When will the issue confront us?	Right now	Next year	2 years from now or more
4 . How broad an impact will the issue have?	Single unit or division		Entire organization
5 . How large is the financial risk or opportunity to the organization?	Minor 10% of the budget	Moderate	Major 25% of the budget
6 . Will strategies require changes in mandates or other rules?	No		Yes
7 . Will strategies require changes in the organization's mission?	No		Yes
8 . Will strategies require changes in the organization's design?	No		Yes
9 . Will strategies require development or elimination of service goals and programs?	No		Yes
10 . Will strategies require changes revenue sources or amounts?	No		Yes
11 . Will strategies require additions or modifications of the facility?	No		Yes
12 . Will strategies require staff expansion or reduction?	No		Yes
13 . Will strategies require changes in stakeholder relations?	No		Yes
14 . Will strategies require changes technology?	No		Yes
15 . Will strategies require significant new learning?	No		Yes
16 . Will strategies require development of significant capabilities?	No		Yes
17 . How apparent is the best approach to resolve this issue?	Obvious	Few details	Not at all apparent
18 . What level of management approval is required for this issue?	Line staff supervisor		Head of major department
19 . What are the likely consequences of not addressing this issue?	Inconvenience		Major disruption and financial loss
20 . How many other groups are affected by this issue?	None	1 to 3	4 or more
21 . How sensitive or potentially contentious is the issue?	Benign	Touchy	Dynamite!

Adapted from Bryson and Alston (2011), Creating Your Strategic Plan: A workbook for public and nonprofit organizations, Jossey-Bass: CA

WORKSHEET 6B Grand Strategy List

Consulting Firm:	Abacus Consultants.
Client Organization:	Aurel Go Systems.
Contact Person:	—
Contact Information:	—

Strategies	Marketing						
1 . What is the purpose of this strategy?	Assurance to be a best of potential partners						
2 . What are the goals / desired outcomes of this strategy?	Brand strength. Sales.						
3 . How does this strategy adddress the issues and achieve issue-specific goals?	Global recognition of product & its uses						
4 . How will this strategy be financed?	Board members & shareholders.						
5 . Which parts of the organization are required to implement this strategy?	Sales & marketing, creative head, a website designer for social media advertisem						
6 . Which stakeholders are crucial for effective implementation of this strategy?	Employees & Sr. Managers.						

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WORKSHEET 6D Summary of Documentary Requirements

Consulting Firm:	
Client Organization:	
Contact Person:	
Contact Information:	

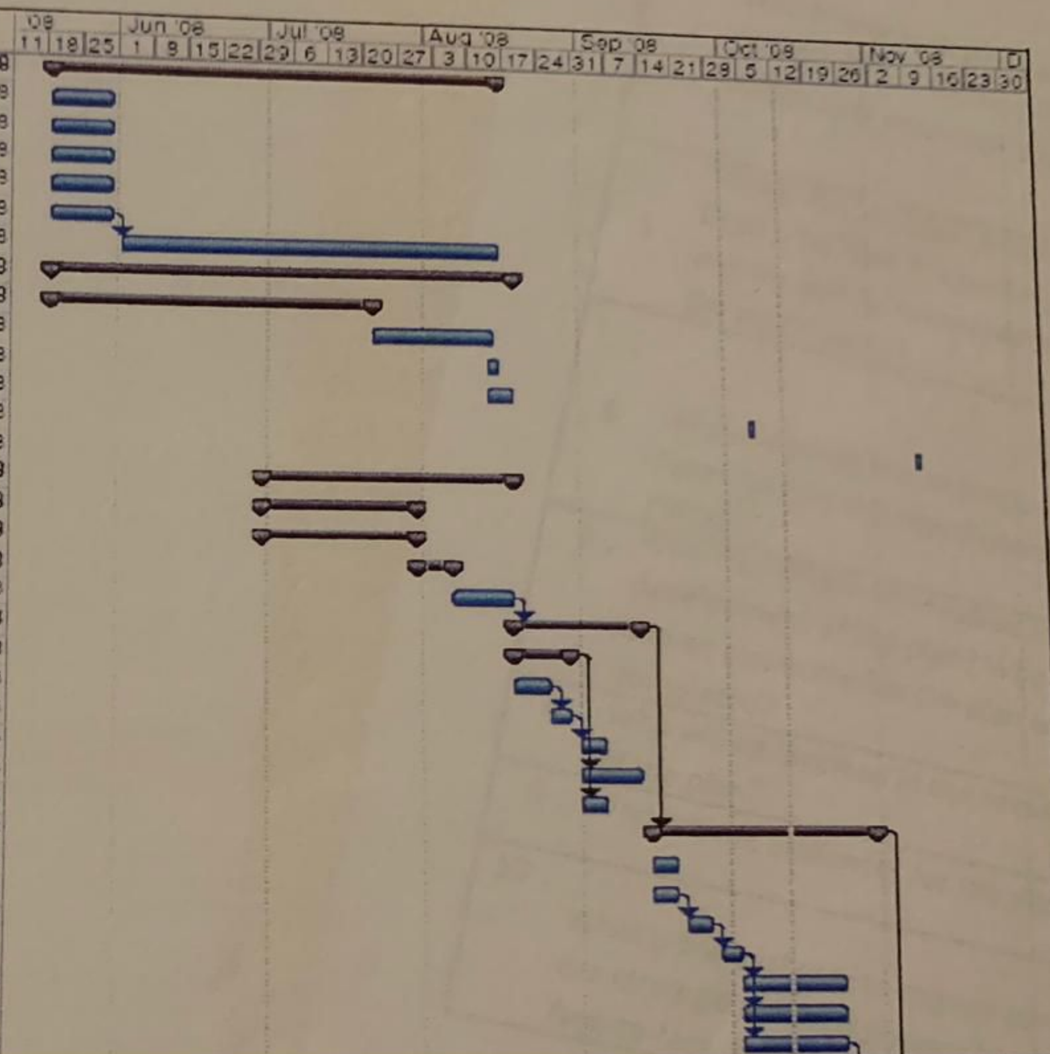
Document Ttitle	Personnel In-Charge	Date Needed

WORKSHEET 6C ACTION PLAN

Consulting Firm:	Abacus consultants
Client Organization:	Aurel systems
Contact Person:	
Contact Information:	

TASKS	RESPONSIBLE PERSONS	DOCUMENTARY REQUIREMENTS	FINANCIAL REQUIREMENTS	TIME FRAME	KEY RESULTS AREAS	MANDATES	MANDATOR
Marketing & Sales 15-20% ↑	Employees Sales person	Sales-tax license General business license	$50K-100,000	1-2yrs	Sales improv - eventually	c	
	Social media developers				10-12% of profits after expenses is our prediction		

ID	Task Name	Duration	Start
1	**Administrative Tasks**	**55 days**	**Mon 5/19/08**
2	Group briefing on project details	10 days	Mon 5/19/08
3	Group briefing on project grading gui	10 days	Mon 5/19/08
4	Listing expectations and group rules	10 days	Mon 5/19/08
5	Identifying members' strengths and w	10 days	Mon 5/19/08
6	Streamlining members'roles and resp	10 days	Mon 5/19/08
7	Learning Java, JSP and Adobe Air	55 days	Mon 6/2/08
8	**Project Proposal**	**66 days**	**Mon 5/19/08**
9	**Creation of proposal draft**	**46 days**	**Mon 5/19/08**
13	Version 2 after Supervisor Review	18 days	Tue 7/22/08
14	Review of proposal by Prof Desai	2 days	Thu 8/14/08
15	Revise and finalize proposal for subn	3 days	Thu 8/14/08
16	Midterm Proposal	1 day	Mon 10/6/08
17	Poster	1 day?	Mon 11/10/08
18	**Inception Phase**	**5 days?**	**Mon 6/30/08**
19	**Group A = Requirement Gathering**	**23 days**	**Mon 6/30/08**
25	**Group B = System Design**	**3 days?**	**Mon 6/30/08**
33	**Finalizing inception phase**	**5 days**	**Thu 7/31/08**
36	Buffer	8 days	Thu 8/7/08
37	**Elaboration Phase**	**19 days**	**Tue 8/19/08**
38	**Use Cases**	**9 days**	**Tue 8/19/08**
39	Gathering more requirements	5 days	Tue 8/19/08
40	Touching up Use Cases	4 days	Tue 8/26/08
41	Coding for Customer Module	5 days	Mon 9/1/08
42	Coding for Procurement Module	10 days	Mon 9/1/08
43	Building Database	5 days	Mon 9/1/08
44	**Construction Phase**	**34 days**	**Mon 9/15/08**
45	Testing for Customer Module	5 days	Mon 9/15/08
46	Testing for Procurement Module	5 days	Mon 9/15/08
47	Amendments to Development/ Chang	5 days	Mon 9/22/08
48	Changes to Development	4 days	Mon 9/29/08
49	Coding for Inventory Module	15 days	Fri 10/3/08
50	Coding for Sales Module	15 days	Fri 10/3/08
51	Coding for Production Module	15 days	Fri 10/3/08



Project: Blink Blithe Gantt Chart 1808(
Date: Mon 10/13/08

Task		Milestone		External Tasks	
Split		Summary		External Milestone	
Progress		Project Summary		Deadline	