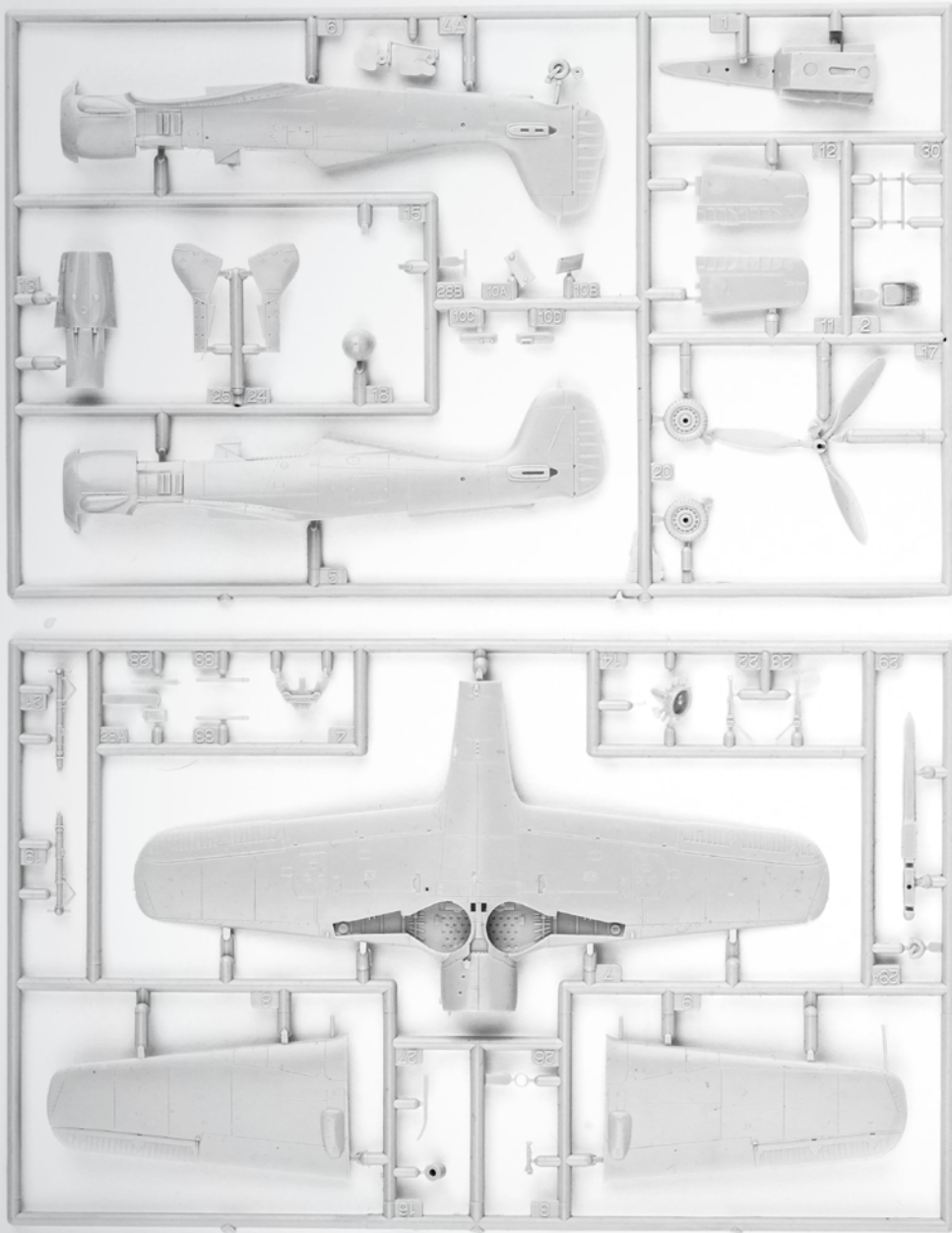


A how-to-guide for a **planning model.**





“ Plans are nothing; planning is everything.”

- Dwight D. Eisenhower



Planning Framework

What are you here to do. For example, do you want to grow, consolidate, or do you need to pivot? What problem do you need to solve to get it done? Things to think about might include:



Your Purpose

You exist to.....why do you exist?



Your Vision

To be the best/only/what? in the xx market.



Your Objectives

- How about Brand: For example: Differentiated by values & culture with high engagement, and awareness and top of the list in customers' consideration sets.
- Or - operating a best-practice approach across the business: organisation wide, optimally efficient/profitable, high quality/high value, knowledgeable and accountable, with continuously optimised delivery & practices.

- And a customer-centric value management approach that delivers optimal, measurable value for customers/employees and shareholders.
- With high employee-brand engagement [$>75\%$] and one of the aspirational brands to work for.



What are your Accountable Priorities?

- Brand: Ensure creative activation and promotion of the brand through internal and external strategies that specifically deliver to and drive business objectives.
- Value: Ensure every activity can deliver measurable value [human and financial] across well managed processes.
- IQHQ: Run a fit for purpose business intelligence system across all areas, providing actionable insights from continuous learning, assessment and analysis – internally and externally.

- People: Engaged teams know what you are trying to do, their role in that and how progress is going. Have them working to and advocating for a customer-centric approach; developing a comprehensive understanding of customer segments, value propositions and engagement strategies in order to optimise competitive advantage and maximise profitability.
- Accountability: Be accountable for best practice performance, delivering measurable quality, efficiency, transparency, and creativity in your work and across our working relationships/partnerships.

Map out your priorities into a 12 month plan.

With clear actions

And clear outcomes

Power up the brand

1 Culture
Hire to and operate values-driven internal human systems that drive high performance.

2 Brand awareness
Build high relevancy awareness/ engagement across activities to build profile & drive sales.

3 Creative
Develop & implement consistent, high quality, measurably effective engagement mechanisms.

High brand equity

Power up people

4 Customer insights
Data driven frameworks [personas & segment models] that drive activities/ value delivery.

5 Segmentation
Develop a segmentation framework leveraged to deliver highly relevant, targeted offers/products.

6 Marketing innovation
Develop high impact activations to deliver cut-through – and build awareness/audience/s.

Part of our EVP - and high value USP

Power up value management

7 IQHQ
Develop knowledge through integration of systems data with qualitative inputs and real time dashboards.

8 Sales & Marketing
Iterate sales & marketing plans – to optimise performance benchmarks across channels & activities.

9 Retention & Referral
Operate customer activities to drive cross-sell/up-sell, retention and referrals.

High value returns

Power up operating infrastructure to drive action and accountability

10 Systems
Aim for fully aligned processes with a tech ecosystem that optimises automation.

11 Expertise
Ensure right fit to strategy internal skills & supply partners are in place for high value and performance.

12 Knowledge
Map your business design/model to cement IP & support scalable delivery as you grow.

We do it better than they can do it - giving them real value

Once you have your high level plan you can start to unpack that as the details within individual or team plans. For example - Power up value management in the 12 month plan, can unpack as follows....



A value management roadmap: example of objective setting.

Focus for actions

Stakeholder outcomes

Create an eco-system that optimises value management

IQ
Develop our/customer knowledge base through integration of systems data with qualitative inputs.

Sales
Implement sales & marketing plans – iterating to meet performance benchmarks across channels & activities.

Retention & Referral
Operate customer/member activities to drive cross-sell/up-sell and referrals

High value returns

The value management initiatives

The objectives

1
Make a customer knowledge map – SWOT – and opportunities.

2
Find out what the best kinds of benchmarks and measures we could use are.

3
Make a knowledge map – SWOT – and opportunities.

4
Work out what we need if we want a really good system.

5
Answer the question: What does a great capture & reporting system look like.

6
Work out what we need if we want a really good system.

7
Create our knowledge system [data capture] roadmap and get on with it.

8
Create a knowledge [insights delivery] roadmap and get on with it.

9
Create our system roadmap and get on with it.



Next Steps: Creating the roadmap.

Take the time to work out actionable and accountable ‘from here - to there’ pathways.

Mission: Our team’s role

Pillars (Our core areas of success)	Value	IQ	People	Brand
Objectives	Develop an integrated customer insights programme.			
Outcomes	From 3 closed systems To 1 integrated system	From To	From To	From To
Actions	Develop RFP for new system build.			
Measures	Vendor appointed by ... System design signed off by... New system in place by...			

Set business wide target metrics.

	From FY18	To FY19
Customer Numbers	<ul style="list-style-type: none"> • xx active customers • Acquisition rates at > • CPA rates • Churn rates at < xx% 	<ul style="list-style-type: none"> • xx active customers • Acquisition rates at > • CPA rates • Churn rates at < xx%
Events	<ul style="list-style-type: none"> • Bookings [type] • Customers- active/churn • Revenue & margin +/- 	<ul style="list-style-type: none"> • Bookings [type] • Customers- active/churn • Revenue & margin +/-
Digital engagement/ traffic	<ul style="list-style-type: none"> • Monthly average [by source/rates/time/ engagement/downloads] • Rate of growth/decline • Leads per week 	<ul style="list-style-type: none"> • Monthly average [by source/rates/time/ engagement/downloads] • Rate of growth/decline • Leads per week
NPS Scores [customers, teams]	<ul style="list-style-type: none"> • Customer • Employee 	<ul style="list-style-type: none"> • Customer • Employee
Revenues and margins by area/ activity stream	<ul style="list-style-type: none"> • Av xx per month • Lifetime values by customer type 	<ul style="list-style-type: none"> • Av xx per month • Lifetime values by customer type

And set target metrics for each area.

E.G., Marketing examples

	FY18
Lead Objectives	<ul style="list-style-type: none"> • XX • XX • XX
Digital Objectives	<ul style="list-style-type: none"> • XX • XX • XX
Event Objectives	<ul style="list-style-type: none"> • XX • XX • XX
NPS Objectives	<ul style="list-style-type: none"> • XX • XX • XX

For a helpful sense check, create your own version of this source of truth activity assessment framework.

- It is aligned with the businesses values – It has been identified how this work will contribute
- It is aligned to specific business strategy with clearly stated objectives
- The solution is customer centric: based on known need/insights that can be clearly articulated
- It supports our brand and contributes to the VP for the intended target
- Any customer facing activity has been user reviewed / usability tested
- If Best Practice Benchmarks exist they have been applied
- Success measures have been identified and outcomes projected
- Operational needs/supporting capabilities have been identified (to ensure the activity is supported and sustainable if it needs to be)
- Where pertinent it has been reviewed against relevant Risk, Legal & Reputational and Brand guidelines/frameworks

If you can't tick these boxes you should not be kicking off.

Review regularly.

The reason Weight Watchers works so well is the weigh in. Plans mean little without implementation.

- Work out what you need to do together.
- Agree who does what.
- Check in regularly on any roadblocks and work on those.
- Assess plans against key market changes.
- Learn from your experiences as you go.
- Iterate processes to suit your needs but use processes.
- Call in help if you need it.
- Celebrate success.

A note on meetings:

- A 10 minute daily stand up can be really effective.
- Longer meetings need objectives, outcomes and time frames.

Ready? Then go.



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