

# Strategy Development Process



J. Bernard Associates, LLC

J Bernard Associates' unique streamlined process combines the talents of your people with our marketing planning and facilitation expertise to create a comprehensive strategic plan.

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The key process components include:

- Analyzing the competitive climate and identifying what it takes to be a market leader
- Prioritizing business segments
- Evaluating strategic capabilities and linking them to realistic strategies
- Developing strategies, objectives and action plans to accomplish specific goals
- Assigning action plan accountability and timelines
- Creating a scorecard with realistic measurements that link directly to strategic objectives
- Identifying a follow-up process to make certain that implementation is on track
- Providing benchmarking experience on critical business issues



The Team Concept gathers the best thinking of the organization, creates a consistent understanding of the business strategy and direction, and develops a sense of results ownership among the participants

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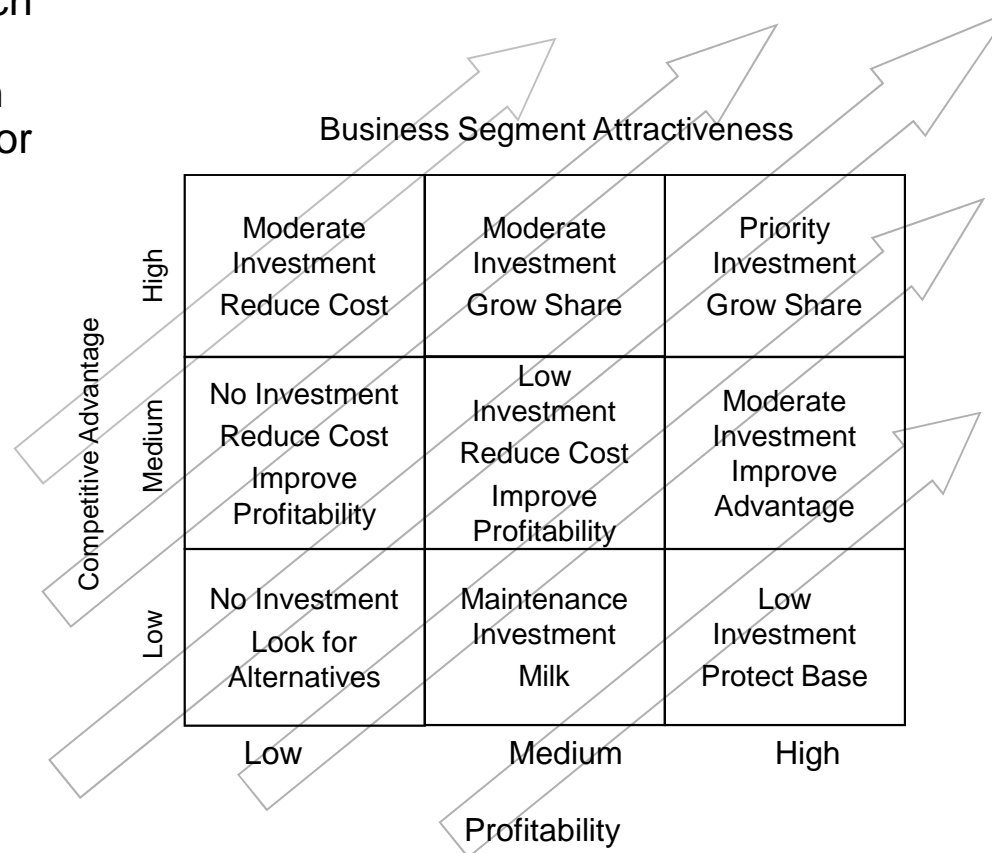
- Individual contributor's expertise and skills provide a variety of opinions and perspectives
- The team owns the process and is responsible for the output
- The team is accountable for the execution of all actions identified by the strategy
- Agreement on all the strategy components provides assurance that the goals are realistic
- An outside facilitator encourages participation from the entire team and allows the business owners/senior managers to participate rather than attempt to manage the process

**The process encourages  
The team to work toward  
critical common goals.**



Data is gathered before the workshop to analyze the business segments as a team and to:

- Develop strategies and objectives based on the relative attractiveness of each business segment
- Prioritize resource allocation based on the opportunities for best return
- Focus activities on business segments where you can sustain a competitive advantage



As part of the pre-workshop questionnaire and during the discussion the impact of the competitive and industry climate creates an understanding of future challenges

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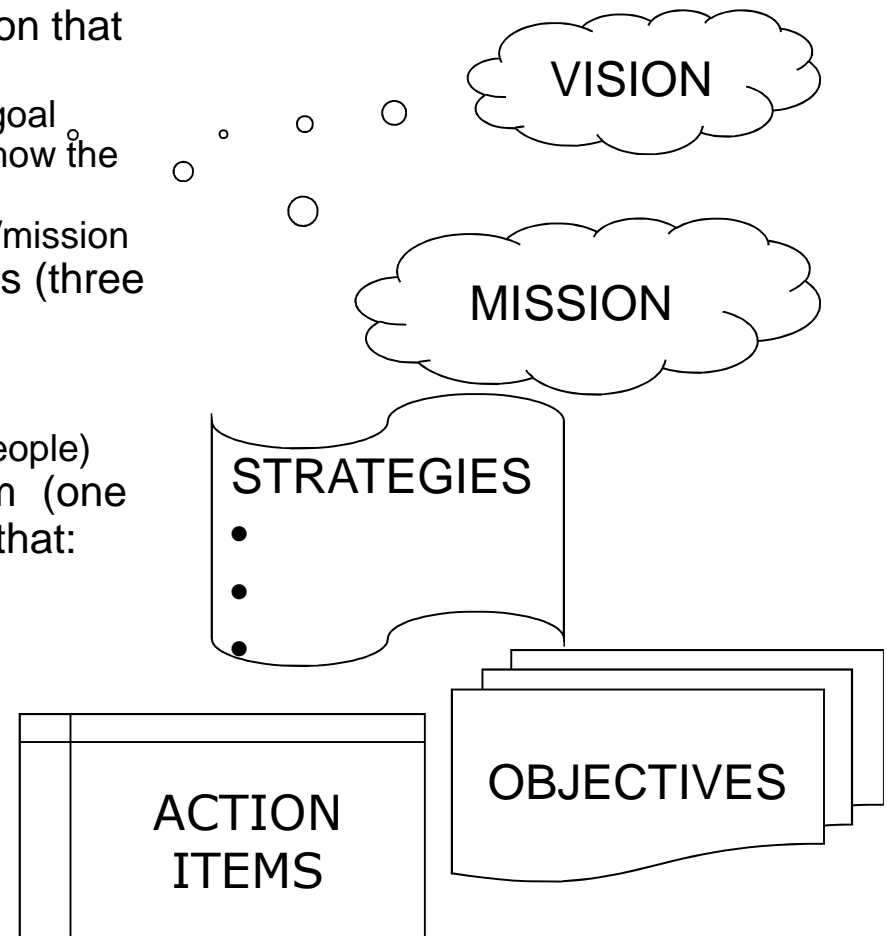
- Competitor trends
  - Select competitors who impact your business today or in the future
  - Identify apparent strategies based on participants existing knowledge
  - Make best assumptions about competitor's future strategic direction
  - Anticipate change



- Future Assumptions
  - Use best thinking of knowledge base
  - Avoid wishful thinking
  - Test assumptions in terms of likely to happen or not happen
- Industry Scenario
  - Describe the future industry scenario in three to five bullets
  - Look three to five years in future
  - Adjust with subsequent strategy reviews

The team uses the information developed during the first phase of the workshop to clearly define the direction for the company

- The team leader creates a Vision and Mission that sets the overall company direction
  - The vision describes the high level company goal
  - The mission provides guidance/principles on how the company achieves the goals
  - The strategy team validates/refines the vision/mission
- The team develops core long-term strategies (three to five years) that:
  - Take advantage of strategic competencies
  - Close critical competency gaps
  - Focus on critical areas (growth, operations, people)
- The team develops two to three shorter-term (one to three years) objectives for each strategy that:
  - Are measurable
  - Stretch beyond current results
  - Are realistic



Action items to be completed in the next 12 months are identified for each objective. Each action is assigned an owner who is responsible for creating and completing the action plan.

Action Plan Strategy \_ Objective \_

#	Action Item	Who	When

The balanced scorecard is a highly effective management tool. It maintains focus on the critical results areas that make your business successful.

Strategic Perspective	Strategic Objective	Strategic Measure	Current Period Results	Current YTD Results	Current Annual Plan	Prior Year Actual	Performance Indicator	Metric Owner
Financial								
Customer								
Internal								
Learning & Growth								

- Incorporates specific measures from action plans
- Assign ownership to ensure realistic results

The agenda keeps the facilitated two day workshop on track. A more detailed agenda specifies the time spent on each topic.

Day 1	Review Questionnaire Responses
	Analyze Business Segments
	Competitive Trends / Future Assumptions / Industry Scenario
	Validate Vision/Mission
	Identify Strategies/Objectives
Day 2	Create Specific Action Plan
	Create Comprehensive Action Plan Timelines and Responsibility
	Develop Balanced Scorecard
	Create Action Plan and Balanced Scorecard Follow-up Process



Contact Jeff Bernard [jbernard@jbernardassociates.com](mailto:jbernard@jbernardassociates.com) or call (484) 678 9591 to begin the process.

- Arrange a conference call between business owner (s) and other critical decision makers to:
  - Determine business needs and application of services available
  - Identify strategy workshop participants
  - Discuss costs
  - Schedule workshops / Agree on terms and approve engagement
- Develop a questionnaire 30 days prior to the workshop to gather pre-workshop information about
  - Each participants perspective on the current goals
  - The relative strengths and weaknesses of the company
  - The competitive climate
- Create a workshop agenda
- Send agenda and the questionnaire with team leader note to underscore the importance of the workshop
- Consolidate responses to create the initial workshop discussion document
- Hold workshop and assign action plan accountability and balanced scorecard ownership to individual team participants
- Prepare workshop notes, one-page strategy summary, the balanced scorecard, and the action plan follow-up template within 48 hours of the conclusion of the workshop and distribute documents to the team
- Agree on the follow-up intervals and strategy updates



**Creating a  
disciplined  
process to  
ensure  
successful  
implementation**



## About Jeff Bernard & J Bernard Associates

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### 40 Years Industry Experience

- *Retail & Wholesale Sales Management*
- *Strategic Planning*
- *Market & Consumer Research*
- *Petroleum Marketing Consulting*
- *Convenience Store Marketing*
- *Certified Meeting Facilitation*

### J Bernard Associates Services

- *Streamlined Strategic Planning*
- *Business Valuation*
- *Retail Site Analysis*
- *Contract Negotiations*
- *Capital Investment Analysis*
- *Share group facilitation*