

**Company X**

**Strategic Planning Questionnaire**

**October 9, 2003**

**VISION:** This is a realistic statement of the future position and value of in three years. Write in the present tense and use no more than 100 words. An example of one man's vision for himself is shown below.

*I will come to America, which is the country for me. Once there, I will become the greatest bodybuilder in history. . . I will go into movies as an actor, producer and eventually director. By the time I am 30 I will have starred in my first movie, and I will be a millionaire. . . I will collect houses, art and automobiles. I will marry a glamorous and intelligent wife. By 32, I will have been invited to the White House.*

Attributed to Arnold Schwarznegger

**In the year 2006, Company X is . . .**

**MISSION:** This is an enduring statement of Company X's purpose—the organizations reason for existence written in one short paragraph of 100 words or less. The mission should include:

- who we are,
- who we serve,
- what services we offer,
- how we make them available, and
- why we do what we do.

**The mission of Company X is . .**

**VALUES:** These are statements of what Company X values and the standards it will apply in dealings with staff, patients, specialists, suppliers, the community-at-large, etc.

**The values of the Company X include . . .**

**CULTURE:** These are statements of the traditions, ethics, and other standards that influence the way things are accomplished at Company X.

**The culture of Company X includes . . .**

**STRENGTHS AND OPPORTUNITIES:** Please describe the internal and external factors that support Company X's movement toward its vision in the space below.

| <b>Internal Factors That Support Movement Toward The Vision (Strengths)</b> | <b>External Factors That Support Movement Toward The Vision (Opportunities)</b> |
|---|---|
|   |   |

**WEAKNESSES AND THREATS:** Please describe the internal and external factors that inhibit Company X's movement toward its vision in the space below.

| <b>Internal Factors That Inhibit Movement Toward The Vision (Weaknesses)</b> | <b>External Factors That Inhibit Movement Toward The Vision (Threats)</b> |
|--|---|
|  |   |

**COMPETITION:** Identify and briefly describe Company X's competition, including strengths and weaknesses.

| <b>Competitor's Name &amp; Location</b> | <b>Competitor's Description</b> | <b>Competitor's Strengths</b> | <b>Competitor's Weaknesses</b> |
|---|---------------------------------|-------------------------------|--------------------------------|
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| <b>Competitor's Name &amp; Location</b> | <b>Competitor's Description</b> | <b>Competitor's Strengths</b> | <b>Competitor's Weaknesses</b> |
|---|---------------------------------|-------------------------------|--------------------------------|
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**GAP:** Do you notice any significant gap between Company X's vision and the current reality? If so, describe the gap in the space below.

**The gap between the current reality and the vision is . . .**

**KEY RESULTS AREAS:** What are the areas in which progress must be made in order to bring about the vision of Company X? These might be things such as marketing, human resources, technology, facilities, etc. List no more than seven key results areas in the space below.

**The key results areas for Company X are . . .**

**THREE-YEAR GOALS:** Describe what you hope to accomplish in each key results area during the next three fiscal years.

| <b>Key Result Area</b> | <b>Goal</b> |
|------------------------|-------------|
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**ACTION PLANS:** Choose a coordinator to lead the development and implementation of an action plan for each key result area. Also determine the date by which the action plan will be completed. An action plan format is shown on the next page.

| <b>Key Result Area</b> | <b>Coordinator</b> | <b>Action Plan Completion Date</b> |
|------------------------|--------------------|------------------------------------|
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### Action Plan Format

| Action | Budget | Person Responsible | Completion Date | Resources Needed |
|--------|--------|--------------------|-----------------|------------------|
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**MEASUREMENTS OF SUCCESS:** Describe how success is measured at Company X.

Possible perspectives include: financial (profitability, cash flow, increased market share, etc.), client (client satisfaction, competitive price, etc.), internal business (client response time, ease of billings, etc.), and innovation and learning (service innovation, continuous improvement, cutting edge technology, etc.).

**Success at Company X is measured by . . .**

**MEASUREMENTS OF SUCCESS—DATA:** Please attach documentation for each of the above measurements for each center for the past three years.