

Annual Strategic Planning Retreat

Program Management Plan

(Cloud-Based)

"Succinct, Rapid, Fluid"

CONFIDENTIAL



STRATEGIC
PERFORMANCE
INSTITUTE



Strategic Performance Institute

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March 3, 2020

Prospective Client,

Thank you for your interest in the Strategic Performance Institute's Annual Leadership Planning Retreat Program. Without question, perhaps one of the most important meetings a company will conduct is their annual strategic performance review.

This meeting not only provides your Team with the opportunity to recap some of the most significant strategic accomplishments of the year but also review some of the most critical challenges that have been addressed that so often fade into past history.

And as so many Leadership Teams have experienced, this is an ideal opportunity to further strengthen the synergy and cohesiveness among your Team. This becomes a natural byproduct of your facilitated collaborative discussions on key issues.

But perhaps one of the most critical keys to the continued future strategic success of your Plan is its Rapid Strategic Execution Infrastructure. Over the past 40+ years our extensive Proven Track-Record on Strategic Planning and Rapid Execution is unparalleled.

By incorporating a unique Cloud-Based, Real-Time Execution Support System our clients experience an innovative, value-added execution assurance component. We're here to help.

In the Spirit of Continuous Growth and Learning.

Dr. Pete Johnson

Dr. Pete Johnson

The Strategic Performance Institute



“Growing Your Business... So, Where’s Your PLAN?”

A Serious **Strategic** Planning Meeting for Serious Leadership Teams.

Our Mission: To provide a highly-organized think-tank environment to discuss directly relevant strategies, ideas and suggestions to further **KAIZEN** and **Grow Your Business**.

Rapid Strategic Execution Made Simple

- ◆ A Hard-Copy “Real-World” Working Strategic Business Plan Focused on Pro-Actively Growing Your Business.
- ◆ Strategic Due Diligence Research and Best Practices Analysis.
- ◆ Monthly Cloud-Based Updates to Verify Your Progress-On-Plan.
- ◆ Monthly In-Depth Strategy Review Sessions to Rapidly Incorporate Shifts and Changes in Your Industry and Marketplace.
- ◆ Strategic Marketing and Branding Support Team to Provide Immediate Assistance in an As-Needed Timeframe.
- ◆ Continuous Strategic Review and Analysis of Your Business and Marketing Strategies, Plans and Resources.

KAIZEN - The Relentless Pursuit of Continuous Innovation and Improvement.

Annual 2-Day Retreat

A Unique Format

8:00 a.m. - 4:30 p.m.

Dr. Pete Johnson
25502 Saddle Rock Place
Laguna Hills, CA 92653

Annual Strategic Goals
Strategic Execution Plan
Collaborative Team Input
Monthly Progress-On-Plan
Cloud-Based Real-Time Updates
Qtrly. Performance Evaluation



Dr. Pete Johnson
 Strategic Analyst
 Peer Advisory Forum

A Unique Concept...

- ◆ Critical Quarterly Performance-On-Goal Evaluation and Strategy / Plan Recalibration.
- ◆ Monthly Progress-On-Plan review of Accountability and Execution Follow-Through..
- ◆ 90-Day Measurable RESULTS are the Name of the Game... Don’t Tell Me, Show Me!



Scan me

Your Annual Strategic Planning Retreat Program Overview

Our Mission: To provide a highly-organized think-tank environment to discuss directly relevant strategies, ideas and suggestions to help further KAIZEN and Grow Your Business.

The Program: Our unique Annual Planning Retreat (APR) format has been developed and fine-tuned across a broad range of business environments over the past 40 years. As a result it provides an unparalleled level of practical "Take-Away" value for your entire Team. Each APR is customized designed to address the top "Deliverables" as defined and detailed by the Client during the preparation and staging phase of their APR Program.

- * Strategic Planning is great, but... Rapid Strategic Execution is vital to the future growth and success of every organization. It's for this very reason that your Rapid Strategic Execution infrastructure is designed and setup during the up front preparation phase of every APR Program.
- * Annual Planning Retreat participation can become a Game-Changer... since teamwork is such an essential component of every Plan's rapid execution. The more key team-members involved in the APR the greater the "Pride of Ownership" that takes place following your Retreat. It's no longer just the Boss's Plan but rather Our Plan and they have a vested interest in the Plan's execution and success.
- * The majority of the time during the Retreat is focused on small team discussion regarding key components of the Plan. This provides detailed input and collaboration during the planning process and helps to foster a "pride of plan ownership by product of your Retreat.
- * Extensive Strategic Analysis of Current Critical Issues and Challenges takes place both prior to the Retreat as well as a key opening small team discussion to demonstrate the awareness of obstacles that may compromise Rapid Strategic Execution. By demonstrating the organization's commitment to understanding the team's concerns goes a long way to demonstrating an execution-focused mindset..
- * Our format incorporates an extensive Internship Support Team to assist during the APR so that our Clients can stay focused on strategic topic discussions while seeing all the data input is being captured in real-time.
- ** The entire APR Program is set-up and organized using a Google Cloud template enabling real-time strategic coordination throughout the Retreat preparation, APR, Plan development and Plan Execution phases. You will leave the Retreat with a hard-copy "Preliminary Draft" of your Working Strategic Execution Plan for follow-up review at the conclusion of your Retreat.

The Key Elements of The Program:

- * A Real-World, "Working" Strategic Business Execution Plan - Updated Monthly
- * 1-Page Strategic Goals, Objectives & Priorities - Evaluated, Updated Quarterly
 - * Current Critical Issues Analysis - Evaluated, Updated Quarterly
- * Target Market Research & Analysis, * Strategic Branding and Touch-Point Analysis
 - * Rapid Strategic Execution as Your Competitive Advantage

And Much, Much More...

A Verifiable Proven Track Record of Success:

Past Client Contact Information Available Upon Request.

Strategic Planning - History To Date

Company:

Date:

Name:

Position:

CEO:

Tenure:

Business:

Founded:

Products:

Employees:

Leadership Team:

Locations:

Past 3 Years Sales Trends:

1. Does your organization currently have any type of written Strategic (Business, Marketing, Sales) Plan place?

2. When was the last time you conducted any type of Management Planning Retreat?

3. Have you used any type of outside consultant or executive coaching to date? (Explain)

4. How do you go about establishing your Annual Goals, Objectives, Budgets, Initiatives, Etc.?

5. Who is typically involved in the development of the Annual Goals, Objectives, Budgets, Etc.?

6. How do you review and evaluate the ongoing Execution of your Annual Goals and Objectives?

7. What is your primary Sales / Marketing Strategy?

8. Ideally what would you like to accomplish with your upcoming Strategic Planning Program?



Pre-Program Staging Check-List

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Client Name

Date: 12/11/2019

No:	FOLLOW-UP ACTION ITEMS	Lead	Current Target Date	Status %	Wingman	Date Listed
01	Targeted Program Dates	Client		100%	Pete	11/01/19
02	Program Dates Confirmed / Agreement	Pete		100%	Client	11/01/19
03	"Hold the Dates" Internal Program Announcement	Client		100%	Pete	11/01/19
04	Company Background History, Past Strategic Planning Material	Pete		100%	Client	11/01/19
05	Company Logos	Client		100%	Pete	11/01/19
06	Organizational Chart	Client		100%	Pete	11/01/19
07	Program Attendee List	Client		100%	Pete	11/01/19
08	Client Lead / Core Team Established	Client		100%	Pete	11/01/19
09	Current Critical Issues Assessment	Client		100%	Pete	11/01/19
10	Strategic Due Diligence Report	Pete		100%	Client	11/01/19
11	Program Development Timeline Set-Up	Pete		100%	Client	11/01/19
12	Top 5 Key Perform. Metrics (KPI) (Past 3 Years)	Pete		100%	Client	11/01/19
13	Retreat - Targeted Strategic Goals, Objectives, Out-Comes	Pete		100%	Client	11/01/19
14	Annual Strategic Goals, Objectives, Mission - Updates	Pete		100%	Client	11/01/19
15	Client Program Cloud Set-Up, Access, Test	Pete		100%	Client	11/01/19
16	Preliminary Draft Agenda Sent Out	Pete		100%	Client	11/01/19
17	Past Staff Meeting Summary Reports - Reviewed	Pete		100%	Client	11/01/19
18	Venue Table Set-Up, Flipcharts, Etc.	Pete		100%	Client	11/01/19
19	"Rapid Execution System" Format	Pete		100%	Client	11/01/19
20	Pre-Retreat Homework Assignments, Sent, Reviewed	Pete		100%	Client	11/01/19
21	Execution Tracking System (ETS) Report (Phase-I)	Pete		100%	Client	11/01/19
22	Program Meeting - Executive Opening Comments	Client		100%	Pete	11/01/19
23	Program Discussion Worksheets	Pete		100%	Client	11/01/19
24	Program Discussion Format, Topics, Out-Briefs	Pete		100%	Client	11/01/19
25	Staff Meeting Audit	N/A		N/A	N/A	11/01/19
26	OPS Team - Roles Discussion Meeting	Pete		100%	Client	11/01/19
27	Core Team Follow-Up Schedule (CTFS)	Pete		90%	Client	11/01/19
28	Monthly Program Performance Review Process	Pete		90%	Client	11/01/19
29	Program OPS Team Preparation, Set-Up	Pete		100%	Client	11/01/19
30	Facilitate Program - Coordinate Discussions	Pete		100%	Client	11/01/19
31	Program SEP Out-Brief Report	Pete		100%	Client	11/01/19
32	Monthly Execution Progress Review	Pete		40%	Client	11/01/19
33	Sales Team Meeting	Client		30%	Pete	11/08/19
34	Monthly Execution Tracking System (ETS) Report	Pete		5%	Client	11/01/19
35						



2019 - Major Strategic Achievements (MSA)

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Name: _____

Date: 12/3/2019

No:	Strategic Accomplishment	Month	Department
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			



2020 - Future Major Strategic Achievements (FMSA)

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Name: _____

Date: 12/3/2019

No:	Strategic Accomplishment	Month	Department
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			



Current Critical Issues List (CCI)

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"Necessity... The Mother of Invention"

Name: _____

No:	CRITICAL ISSUE / PROBLEM	"A" Priority	Dept.	Critical Date	Status	Listed	
01				--	--		
02				--	--		
03				--	--		
04				--	--		
05				--	--		
06				--	--		
07				--	--		
08				--	--		
09				--	--		
10				--	--		
11				--	--		
12				--	--		
13				--	--		
14				--	--		
15				--	--		
16				--	--		
17				--	--		
18				--	--		
19				--	--		
20				--	--		
21				--	--		
22				--	--		
23				--	--		
24				--	--		
25				--	--		
26	CCI Instructions: Day-1: List Every / All Problems/Challenges, (3-4 Word Bullet-Points), Date Listed Day-2: Any Additional Issues, Date Listed Day-3: Any Additional Issues, Date Listed, Flag Only "A" Priorities of Entire List						
27							
28							



Past Year Summary

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*“Because... The Most Organized, Most Focused, Most Prepared...
Will Consistently PREVAIL!”... Sun Tzu (The Art of War)*

A. Top-4 Metric Goals for This Year:				
Metrics	2020	2021	2022	2019
1.				
2.				
3.				
4.				
B. CEO's - Direct Reports / Position:				
1.		3.		
2.		4.		
C. Top-3 Past Major Strategic Accomplishments:				
1.				
2.				
3.				
D. Top-3 Critical Critical Issues:				
1.				
2.				
3.				
E. Top-3 Upcoming Key Events:				
Event	Date	Total Days	Location	Team
1.				
2.				
3.				
F. Top-3 90-Day Major Strategic Priorities:				
Strategic Priority	Lead	Wingman	Target Date	Progress
1.				
2.				
3.				

Annual Planning Retreat Agenda



Client Name

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December 3-4, 2019 - Laguna Hills, CA

Agenda - Day-1

Preliminary Draft

WIFI: PJHome3113

- 8:00** Coffee, Tea, Etc.
- 8:00** Call-To-Order, Agenda, Opening Comments
 - Introductions: Name, Position, Tenure
 - Logistics Overview, RTDC Procedure, Teams Set Up
 - Overview, APR Ground-Rules, APR Check-List, REAS-Dec2019
 - **2019 Review: MSA, FMSA, CCI**
 - Team Discussions - Phase 1
 - Group Photo
 - **2020 Strategies: KEC, KPIA, FOC**
 - Team Discussions - Phase 2
- 5:00** Day-1 Review, Survey, Closing Comments, Adjourn Day-1

Agenda - Day-2

- 8:00** Coffee, Tea, Etc.
- 8:00** Call-To-Order, Agenda, Opening Comments
 - **2020 Strategies: SGOP**
 - Team Discussions - Phase 3
 - Group Photo
 - **2020 Execution (R#4) - SAP Topics**
 - Team Discussions - Phase 4
 - **2020 Follow-Up - RES, CTFS, REAS**
 - Team Reviews - Round #5
 - CTFS Schedule Updates
 - SEP Reports - Out-Brief Report
- 5:00** Retreat Review, Closing Comments, Adjourn Retreat

KAIZEN - The Relentless Pursuit of Continuous Innovation and Improvement.



Strategy Action Plan - Proposed

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Topic: _____

Date: _____

Team: ___ **Lead:** _____ **Wingman:** _____ **Team-Mates:** _____

A. Strategic Objectives / Goals:		Initial Draft: <u>12/11/2019</u>	
1.			
2.			
3.			
B. <u>Additional</u> Critical Issues / Challenges:		D. Key Elements: (<u>Show Me!</u>)	
1.		1.	
2.		2.	
3.		3.	
C. The Ideal Game Plan:			
1.		7.	
2.		8.	
3.		9.	
4.		10.	
5.		11.	
6.		12.	
E. Follow-Up Actions:		Lead	Wingman
1.			
2.			
3.			
4.			
5.			
6.			



Rapid Execution Accountability System

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Client Name - Month Of: February

Date: 2/3/2020

A. Top-3 Strategic "A" Priorities					
No.	Strategic Priority	Lead	Wingman	Tgt. Date	Progress
A1.					
A2.					
A3.					
B. Priority Follow-Up Actions					
No.	Follow-Up Actions	Lead	Wingman	Tgt. Date	Progress
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
C. Important Meetings, Calls, Appointments, Emails (See Calendar, Pre-Prep)					
1					
D. Top-2 Most Significant Accomplishments Since Last Meeting					
#1.		6.			
#2.		7.			
3.		8.			
4.		9.			
5.		10.			



Strategic Planning Team / Follow-Up Schedule

Date: 3/4/2020

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A. Leadership Team (LT):

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

B. Core-Team:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

C. SPI-Team (SPI):

1. Rene Rojano
2. Angel Mendoza
3. Phong Tieu
4. Jessica Brownfield
5. Nick Hatanaka
6. Huy Pham

D. 2020 Meeting Schedule:

All Dates Subject to Change

Details

#	Date	Day	Event	Time
1	Dec. 3-4, 2019	Tuesday	Annual Strategic Planning Retreat	8:00 AM
2	Dec. 12, 2019	Thursday	Sales Team Meeting	TBD
3	Jan. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
4	Jan. TBD, 2020		Monthly Performance Review - Leadership Team	TBD
6	Feb. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
7	Feb. TBD, 2020		Monthly Performance Review - Leadership Team	TBD
8	Mar. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
9	Mar. TBD, 2020		Monthly Performance Review - Leadership Team	TBD
10	Apr. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
11	Apr. TBD, 2020		1st Quarter Performance Review - Leadership Team	TBD
12	May TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
13	May TBD, 2020		Monthly Performance Review - Leadership Team	TBD
14	Jun. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
15	Jun. TBD, 2020		Monthly Performance Review - Leadership Team	TBD
16	Jul. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
17	Jul. TBD, 2020		2nd Quarter Performance Review - Leadership Team	TBD
18	Aug. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
19	Aug. TBD, 2020		Monthly Performance Review - Leadership Team	TBD
20	Sep. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
21	Sep. TBD, 2020		Monthly Performance Review - Leadership Team	TBD
22	Oct. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
23	Oct. TBD, 2020		3rd Quarter Performance Review - Leadership Team	TBD
24	Nov. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
25	Nov. TBD, 2020		Monthly Performance Review - Leadership Team	TBD
26	Dec. TBD, 2020		Core-Team Monthly Plan Execution Review	TBD
27	Dec. TBD, 2020		Annual Strategic Planning Retreat	TBD

Sample

KAIZEN
"The Relentless Pursuit of
Continuous Innovation and
Improvement"

CONFIDENTIAL

Client Name

Riverside, CA

Initial Draft

**2020 "Working" Strategic
Business Execution Plan**

*Rapid Military Execution of Your Business Strategy...
"When Your Strategies and Plans Just Can't Afford to Fail!"*

Monthly Update

January 2020

"Succinct, Rapid, Fluid"

"Growing Your Business... So What's Your PLAN?"

(Cloud-Based)

Revision: 1/2/2020

Phase II

The Strategic Performance Institute

Dr. Pete Johnson

Pete@StrategicPlanning.com

(949) 233-5566

(WIFI Code: PJHome3113)



(SEP)



Strategic Goals, Objectives, Priorities

Client Name

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1. Our Mission:

Date: 1/2/2020

To definitively establish in precise terms the strategic Identity (Brand), Image and Reputation of our company, our products and our services such that in the mind of our target marketplace there could be no possible alternative available anywhere regardless of price.

2. Branding - Competitive Advantage:

Next Quarterly Review: 4/3/2020

The Most Organized, Most Focused, Most Prepared... Consistently Prevails! - Sun Tzu (The Art of War - 500BC)

3. Strategic Introduction:

Name, Position, Company, Location, Years with Company.

4. Metrics:		<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2025</u>
1.					
2.					
3.				(See Confidential Report)	
4.					
5.					
5. Future Major Strategic Accomplishments (MSA):		<u>Lead</u>	<u>Wingman</u>	<u>Tgt.Date</u>	<u>Progress</u>
1.					
2.					
3.					
4.					
6. Current Critical Issues (CCI):		<u>Lead</u>	<u>Wingman</u>	<u>Tgt.Date</u>	<u>Progress</u>
1.					
2.					
3.					
4.					
7. Upcoming Key Events (UKE):		<u>Date</u>	<u>Location</u>	<u>Lead</u>	<u>Wingman</u>
1.	Event				
2.					
3.					
4.					



A Verifiable Proven Track-Record

Date: 11/1/2019

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No:	Client	Key Contact	Location	Start	Duration	Type Project	Comments	Origin
01	STRICOM (US Army)	Dave Manning	Orlando, FL	1994	11 Years	Rapid Strategic Execution	3 Weeks per Month	Evans
02	Wise Manufacturing	Bill Prettyman	Atlanta, GA	1986	14 Years	Rapid Strategic Execution	1 Week per Month	SpinOff
03	Duke Energy	John Pridgen	Charlotte, NC	1994	1 Year	Competitive Strategic Selling	2 Weeks per Month	Evans
04	US Airways	Ed Jeffreys	Pittsburgh, PA	1980	2.5 Years	Competitive Customer Service	4 Weeks per Month	Lizardi
05	TD Financial Services	Dale Dykema	Anaheim, CA	1991	3.5 Years	Strategic Planning	2 Days per Month	SpinOff
06	DAHC (US Army)	MG Hicks	Arlington, VA	2007	1.5 Years	Strategic Planning	1 Week per Month	Manning
07	ETOLA Industrial	Henri Manner	Tianjin, China	2011	5 Years	Rapid Strategic Execution	3 Weeks per Year	Vistage
08	AESIP (US Army)	COL Flanders	Alexandria, VA	2012	1 Year	Rapid Strategic Execution	1 Week per Month	LinkedIn
09	Cayman National Bank	Eric Crutchey	Grand Cayman	1998	2 Years	Strategic Planning	1 Week per Quarter	Agent
10	US Army Staff College	Peter Cook	Ft. Belvoir, VA	2007	2 Years	Strategic Thinking	2 Days per Quarter	Agent
11	York Graphics	John Grove	York, PA	1985	5 Years	Strategic Execution	1 Week per Month	SpinOff
12	Georgia Power Group	Wendy Kraunelis	Atlanta, GA	1995	1 Year	Competitive Strategic Selling	1 Week per Month	NSA
13	American Management Association	--	New York, NY	1981	4 Years	Leadership	2 Weeks per Month	Lizardi
14	Boelter Supply Company	Bill Boelter	Milwaukee, WI	1991	7.5 Years	Strategic Planning	1 Week per Year	YPO
15	Australia Sales Congress	Terry Butler	Brisbane, Australia	1987	5 Years	Competitive Strategic Selling	2 Weeks per Quarter	NSA
16	Advanced Management Institute	Don Dible	San Francisco, CA	1984	2 Years	Strategic Marketing	2 Weeks per Month	NSA
17	National Association for Healthcare	Val Halamenderas	Washington, DC	1992	4 Years	Strategic Planning	1 Week per Year	SpinOff
18	Young Presidents Organization	--	New York, NY	1986	6 Years	Rapid Strategic Execution	1 Day per Month	SpinOff
19	Vistage / TEC	--	San Diego, CA	1996	20 Years	Rapid Strategic Execution	3 Days per Month	SpinOff
20	Al-Waseel	Anas Dehlan	Jeddah, Saudi Arabia	1996	2 Years	Strategic Planning	2 Weeks per Quarter	SpinOff
21	American Society of Association Executives	Susan Sarfati	Washington, DC	1984	9 Years	Strategic Planning	3 Days per Year	SpinOff
22	American Society for Quality Control	Paul Borawski	Milwaukee, WI	1989	3 Years	Strategic Planning	1 Week per Year	SpinOff
23	Consumer Bankers Association	Antigoni Ladd	Washington, DC	1986	4 Years	Strategic Planning	3 Days per Year	SpinOff
24	Training & Simulation Technology Consortium	Mike Walter	Orlando, FL	1995	1 Year	Rapid Strategic Execution	1 Week per Month	Manning
25	Defense Logistics Agency	Mike Burke	Arlington, VA	1994	2 Years	Strategic Planning	3 Annual Retreats	Evans





File: 05 - BF - Group Briefing



File: 06 - BF - Group Briefing









File: 12 PAF Annual Retreat





“STRATEGIC PLANNING AND OFF-SITE RETREAT PROPOSAL”

For Your Review and Consideration

Sample

PROGRAM OVERVIEW:

The scope of this proposal is to outline and recommend for your consideration a comprehensive “Working” Strategic Planning and Execution Program and Planning Retreat that would help establish a solid benchmark for the and its future growth. This is a customized Program that would not only assist in establishing a sound “Working” strategic planning process but incorporates a pro-active **“Implementation Assurance System”** to help coordinate the essential Execution Phases as well.

Having worked extensively over the last 35 plus years with a broad range of clients in both the public as well as private sectors, our Strategic Planning Methodology has been constantly reengineered to produce unparalleled “performance-on-plan”. It continues to maintain a well-established track record for results. It has been developed and honed through years of hands-on experience with clients in some very demanding and constantly shifting environments, be it political or economic. It’s for this very reason that we feel this “Methodology” will provide you with the flexibility and accountability to accomplish and meet your strategic goals and objectives.

PROGRAM MISSION:

To organize, set-up, coordinate and facilitate the Strategic Planning and Execution “Program” and Two-Day Off-Site Retreat in complete compliance with all designated goals, objectives and deliverables to be outlined by the ~~Thompson C~~ “Core” Management Team.

PROGRAM OBJECTIVES:

1. To conduct comprehensive, detailed “Strategic Due Diligence” in preparation for the Strategic Planning Program and Strategic Planning Retreat.
2. To design, set-up coordinate and install a highly adaptive Strategic Planning and Execution “Program” capable of outlining a clear and cohesive road-map for future activities and initiatives.
3. To develop, coordinate, set-up and facilitate a highly team-synergistic Two-Day Strategic Planning Off-Site Retreat.

4. To coordinate the development of a formalized “Working” Strategic Plan that focuses on collaborative team involvement and progress-on-plan.
5. To develop an Execution Tracking System (ETS) to track, monitor and coordinate the implementation, follow-through and accountability.

Management Team Synergy and Cohesiveness is such a key ingredient of every Strategic Planning Program and Retreat, our concept is unique in advocating the “*integration*” of additional key participants as logistically possible. Not only does this visibly demonstrate executive management’s respect for the opinions and input from within their organization, it provides an enhanced “Pride-of-Ownership” as well. Photos of some past client program are viewable on our web site (www.StrategicPlanning.com) show numerous Retreats / Off-Sites consisting of a broad range of 5 to as many as 40 participants, always utilizing a “sub-team discussion group” format.

A MULTI-PHASED SYSTEM:

Phase I – Strategic Due Diligence, Staging and Set-Up - Strategic Planning Program:

*On-Site Man-Days = 0 (Plus In-Office Man-Days = 4) --- Sub Total: No Charge
Associated Travel Expenses --- Not Applicable*

Phase I will focus on the essential “front-end Strategic Due Diligence” elements that are critical in developing and producing a highly organized and productive Strategic Planning Off-Site Retreat and Program. This insures that each and every key goal, objective, issue and deliverable are strategized in detail prior to the actual Off-Site. In short... **strategic planning to conduct strategic planning.**

Details would be discussed during this custom-design and development activity that would result in the creating of an extensive series Templates, Worksheets and Execution Systems. This helps to dramatically organize and coordinate the “Deliverables” during the Strategic Planning Retreat. Also during this Phase the 30-Day and 90-Day Follow-Up Plans are outlined, designed and “Base-Lined”.

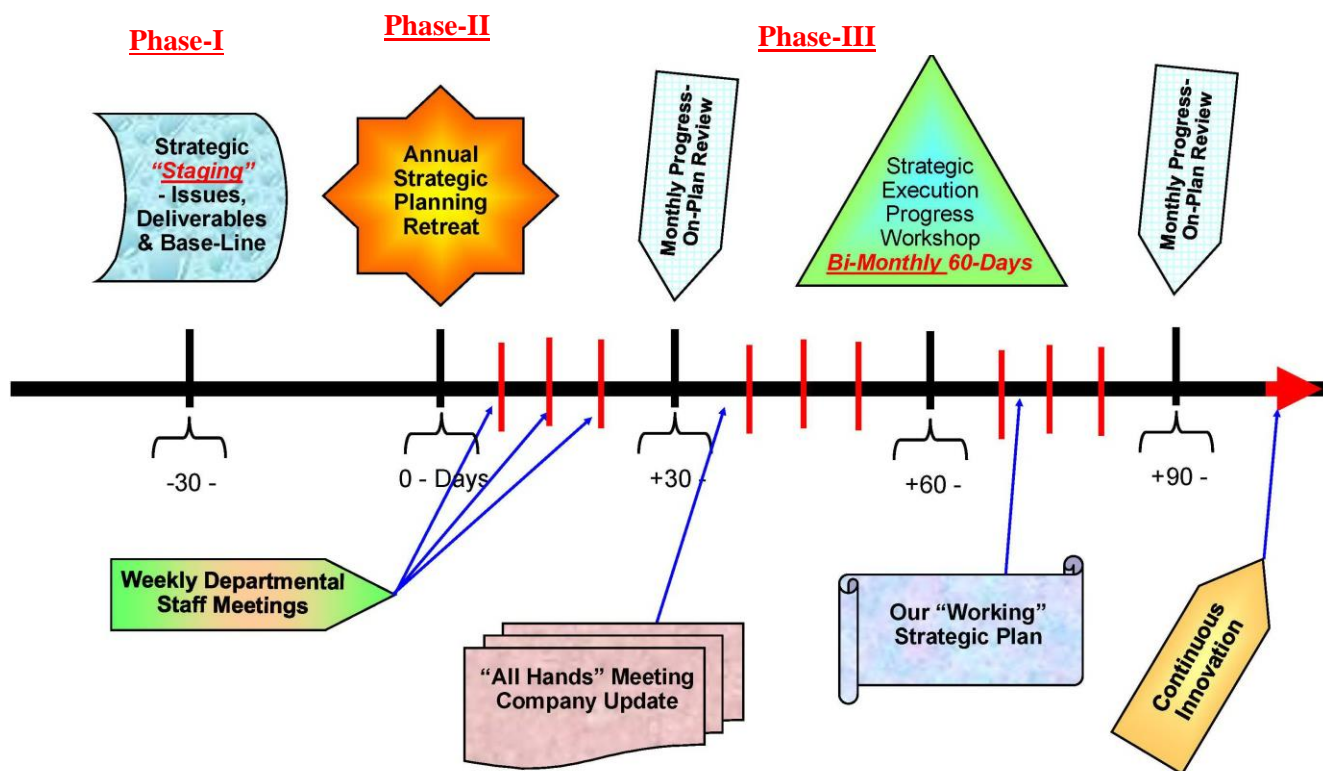
Phase II – The Strategic Planning Retreat (Event):

*On-Site Man-Days = 3 (Plus In-Office Man-Days = 4) --- Sub Total: \$12,000
Fixed Air Travel and Rental Car Expenses --- \$700, Hotel - Billed to Your Master Account*

Phase II addresses the organizing, coordinating, conducting and facilitating of the Strategic Planning and Execution Retreat. It is this strategic event that is an essential ingredient in establishing “Pride of Ownership” and direct involvement with strategic planning. This also sets the stage for all of the key follow-through and execution activities, very often the most ineffective components of many of the traditional strategic planning retreats. The Retreat will focus on team assigned discussions that will provide first hand input on issues, goals objectives and proposed Strategy Action Plans.

We have found through extensive hands-on experience that organizations and their Teams have become increasingly frustrated by consultants and facilitators advocating open discussions or debates on the word-smithing vision, mission or value statements. In fact, open-forum discussions of any type tend to be counter-productive. We also advocate avoiding any academic exercise such as SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats). Over the years we have developed a far more effective approach to cover these same issues. And because of the level of Strategic Due Diligence and Base-Lining that were produced during the pre-staging, your Retreat will produce a surprising level of concise output that translates directly into your “Working” Strategic Plan.

“SAMPLE STRATEGIC RETREAT TIME LINE”



Phase III – Strategic Execution and Follow-Through (Execution and Accountability):

On-Site Man-Days = 2 (Plus In-Office Man-Days = 2) --- Sub Total: \$5,000 (Per Trip)

Fixed Air Travel and Rental Car Expenses --- \$700, Hotel - Billed to Your Master Account

Phase III addresses the follow-through and accountability process of your Strategic Planning Program and Retreat. All too often after returning from an exceptionally productive Retreat history has shown that a “back to status quo” behavior tends to take place. Demonstrating discipline, accountability and follow-through becomes a critical link. The Execution System (Tactical Implementation Plan or TIP) is set in place during your Retreat and as an integral part of your Program’s deliverables. We coordinated and facilitated in a hands-on manner your first “Monthly Progress-On-Plan” Review is to help insure the proper tempo for ongoing follow-through is clearly established and understood.

ADDITIONAL OPTIONS:

Phase IV – The Formal “Working” Strategic Plan (The Document):

Pending Additional Discussion...

The vast majority of traditional strategic plans tend to become “static” documents and tend to become somewhat outdated within months of their development. This is due primarily to the rapidly changing nature of today’s environment. To the contrary, a “Working” Strategic Plan has built-in elements that “Re-Calibrates” every three months in line with sound strategic leadership practices. This keeps you abreast of all key adjustments and modifications enabling you to effectively keep your strategic planning initiatives on track and pro-actively accomplishing the strategic goals, objectives and deliverables as targeted.

The drafting, development and writing of this “Working” Strategic Plan needs to be a “Collaborative” process involving input and limited hands-on participation by various members of your organization working in conjunction with your Strategic Planning Taskforce. Here is where the “Pride-of-Ownership” concept really begins to pay dividends.

Phase V – Quarterly Strategic Re-Calibration (Performance-On-Goal):

Pending Additional Discussion...

Experience and common sense have shown us that the single greatest shortcoming of most strategic planning programs is the failure to “ADAPT” in a timely enough manner to the critically changing and shifting environment that we find ourselves in today... be it economic or political. It’s for this very reason that we have incorporated a unique “Quarterly Recalibration Function” into our “Working” Strategic Planning and Execution Program. By rethinking and re-strategizing any and all areas we are trending off of our targets well in advance we are able to provide a true “Reality-Based” approach extending throughout the 12 month cycle of the strategic planning year. This is *“Strategic Planning Assurance... For REAL!”*

PROFESSIONAL CREDENTIALS:

With a 35+ year proven track record as a professional strategic planning consultant, I have worked with an extensive range of clients from privately and publicly traded corporations / businesses to significant strategic projects with the US Army as well as the Joint Forces Command. During this time I’ve personally organized, set-up, coordinated and facilitated over 750 Strategic Planning type Off-Sites and Retreats. My professional web site, www.StrategicPlanning.com, can attest to the extent of my Strategic Planning and Execution credentials. Very simply stated...when it comes to Strategic Planning... *“We Do It For Real!”*

REFERENCES:

1. David Manning - Former Dir. Strategic Planning, STRICOM (Army) Orlando, FL 407-432-9701
2. Robert Kelley - President, Adaptive Business Leaders Organization Orange, CA 714-639-5730
3. Lee Greytak - President, First Dynamic Business Solutions, Brea, CA 714-768-2815

- *Additional References and Client Contact Information Details Available Upon Request*

Submitted By:

*Dr. Pete Johnson
Strategic Performance Institute*

PROGRAM CONFIRMATION

STRATEGIC PERFORMANCE INSTITUTE

25502 Saddle Rock Place, Laguna Hills, CA 92653 Tel: +1 949-233-5566

Organization:

Sample

Authorized Representative:

Address:

City: Lanham, MD 20706

Telephone: (Business)

Cell:

Program Dates: November 8 - 9, 2016

Location: Lanham, MD

Program Topic: Strategic Planning Retreat

Est. Attendance: 15 +/-

Program Length: 2 Days, Plus Pre-Day Meeting

Start Time: 8:00 am

Meeting Theme: Strategy, Planning and Execution

Other Speakers: N/A

Actual Program Location: To Be Determined

◆ PLEASE ARRANGE FOR GUARANTEED RESERVATIONS BILLED TO YOUR MASTER ACCOUNT.

Reservation Dates: November 6 - 10, 2016

Hotel: To Be Determined

Hotel Address: To Be Determined

Hotel Phone: TBD

Hotel Web: TBD

Nearest Airport: Washington, DC

Airport Distance: TBD

Honorarium: \$12,000.00

Plus: Fixed Air Travel Expenses (\$700.00)

Confirmation Deposit: \$6,000.00

Balance: \$6,000.00

◆ BALANCE DUE and Associated Expenses Will Be Billed Following Your Program.

Authorized Signature (Client): _____

Date: _____

Strategic Performance Institute: Dr. Pete Johnson

Date: 21 September 2016

◆ Please sign and return a copy with your deposit.

We look forward to working with you.

DR. JOHNSON'S CLIENTS INCLUDE...

Abbot Diagnostics
ACE Hardware
AGC Computers, Inc.
Agway
Alpha Graphics
American Farm Bureau
American Pacific Securities
Apple Computer Corporation
ARCO Corporation
Arthur Anderson and Company
Associated Grocers, Incorporated
Atlas Van Lines
Baxter Health Care Corporation
BC Central Credit Union
Bellsouth Corporation
Birtcher Construction, Ltd.
Brown & Sharpe Manufacturing
Builder Marts, Inc.
Calcomp - Lockheed Corporation
California Dental Health Plan
California Republic Bank
CARE Enterprises
Central Maine Power
Charles Chips
Chicago Title
Choice Hotels
Commerce Bank
Continental Cablevision
CPA Associates
Crystal Brands
CSC Index, Inc.
Defense Logistics Agency
Delta International Machinery Corporation
Digital Systems Corporation
Dixon Paper Company
Doctors Medical Center
Dole Food Company
DSC Communications
Duke Power Company
Dun and Bradstreet Software Services
E.D.S. Corporation
Emulex Corporation
Entergy Corporation
The Executive Committee (TEC)
Exel Logistics
Farmland Industries
Fidelity Union Mortgage Company
First Alert Professional Security Systems
First Interstate Bank
F.T.D. Florists
Fluor-Daniels Corporation
General Foods Corporation
Georgia Power Company
Grocer's Supply Company
Group Health of America
Growmark Corporation
Hallmark Cards
Hanes Hosiery
Hartco Enterprises, Inc.
Hewlett-Packard Company
Hills Pet Products
Honeywell Corporation
HSI Health Plans
Hudson City Savings Bank
Hussman Corporation
Inc. Magazine

IBM Corporation
J.D. Power and Associates
Keene, Inc.
Kentucky Fried Chicken
Liberty Diversified Industries
Lawn Doctor
Liberty Diversified Industries
Life Touch National School Studios
Linc Corporation
Lincoln Financial Services
Marie's Dressings and Sauces
Master Halco, Inc.
Mayflower Group
McDonnell-Douglas Computer Division
Memorial Hospital
Mercantile Bank
Meridien Hotels
Midland Ross Corporation
Monsanto Corporation
National Data Corporation
Nash-Finch Company
Northern States Power Company
Northern Telecom Corporation
One Central Bank
Optical Laboratories
P.H.H. Corporation
Pitney-Bowes Corporation
PME-Army Center for Civilian Human Res. Mgt.
Policy Management Systems Corporation
Prefab Transit Company
Prudential Group Life Insurance Company
Quantum Chemical Corporation
Realty World - Canada
Risk Management Group
Rosemount, Inc.
Rosen Medical Group
Roseville Hospital
Royal Crown Cola
Saab Training, LLC
Saudi Arabia Airlines
Security Bancorp, Inc.
Seminarium La Excelencia
Sheraton Hotels International
Silver Diner Development Corporation
Sisters of the Poor - Hospital Group
Snyder, Langston
Southern California Edison
Spectra Foods Corporation
St. Joseph's Hospital
St. Paul Medical Center
Staub Metals
STRICOM
SunHealth
Telecator
Time-Warner Communications
Training and Simulation Technology Consortium
United Temporaries
University of Phoenix
United Van Lines
UNIDATA Corporation
U.S. Department of Defense
U.S. West Communications
Walker Interactive Systems
Westell Technologies, Inc.
Westin Hotels
*And many, many more.....

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