

INTERNAL ANALYSIS STRATEGIC PLANNING

CULTURE

IMAGE

STRUCTURE

KEY STAFF

ACCESS TO RESOURCES

POSITION ON THE EXPERIENCE CURVE

OPERATIONAL EFFICIENCY

OPERATIONAL CAPACITY

BRAND AWARENESS

MARKET SHARE

FINANCIAL RESOURCES

EXCLUSIVE CONTRACTS

PATENTS AND TRADE SECRETS

Strategic Plan: 200_ Task Completion Form

Goal 1. Place goal statement here.

Objective 1:1

Place first ACTION STEP of goal statement here.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 1. Place each task that will be used to achieve the action step in this grid.			
Task 2.			

Objective 1:3

Introduce host institutions to Keystone Innovation Zone opportunities and provide them with support necessary to capitalize on them.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 3. Provide First Step courses and other start-up information specifically for students, faculty and staff of their host institutions to encourage business start-ups.			
Task 4. Develop seminars and specialized consulting services for researchers to help commercialize technologies being developed at host institutions.			
Task 5. Expand incubator programs for students at additional host institutions.			
Task 6. Establish a method to link growing companies seeking new employees with students from host institutions.			

Objective 1:6

Expand services to help entrepreneurs develop new products and find new markets for their products and services.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 1. Develop educational programs for use on product differentiation, new market identification, and market entry strategies.			
Task 4. Help existing U.S. Department of Defense contractors respond to shifting Defense spending priorities by identifying new markets for their products and services.			
Task 5. Develop educational programs, information resources, and SBDC staff expertise to help small firms understand and comply with new regulations affecting international trade.			
Task 9. Refer clients to other partner economic development organizations to ensure that all the needs of businesses are met and that they are fully capable to enter new markets and comply with new security trade regulations.			

Objective 1:7

Partner with other organizations to provide services to contribute to the vitality and growth of business districts.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 1. Design and deliver comprehensive business and economic development assistance programs that focus on specific needs and conditions affecting these areas by providing individuals and firms the information, education, and guidance they require to make successful adjustments.			
Task 3. Partner with the Pennsylvania Downtown Center and participate in the economic restructuring committees of local downtowns to educate downtown businesses about SBDC services.			

Objective 1:9

Support the continuing operation of successful Pennsylvania businesses by helping them to prepare for transitions in ownership and/or management.

Goal 2. The Pennsylvania Small Business Development Centers will expand its expertise for assisting agri-business, travel and tourism. It also will expand its expertise for assisting other targeted industry segments on a regional basis.

Objective 2:1

Expand expertise and services to address the needs of companies in these industry sectors through hiring, resource acquisition, professional development and strategic partnerships.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 2. Work with other economic development organizations proactively as gaps in management capabilities are identified or as services provided are modified to cooperatively fill the need.			
Task 3. Provide information, consulting, and education that lower the barriers for these businesses to gain access to capital, technology, information and markets.			
Task 4. Develop and implement educational programs to assist agri-businesses and manufacturing businesses in developing strategies that enhance their productivity and competitiveness at the enterprise and industry level to include the use of international trade, government marketing, technology commercialization, and compliance specialists throughout the network.			

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
<p>Task 7. Revise the professional development plan to ensure development of staff skills and knowledge to address the particular needs of, and to provide services to, agri-business, travel and tourism, manufacturers and other targeted industry sectors. Professional development events will be held on a regional basis to assist centers in building industry specific expertise.</p>			
<p>Task 8. Leverage strategic partnerships with federal, state, and local government agencies, other economic development agencies, banks, non-profit organizations, host institutions, colleges and universities, and other institutions to support the development and growth of these businesses in Pennsylvania and to increase SBDC staff expertise, and invite representation of these groups to join the Advocacy and Resource Development Board.</p>			

Objective 2:2

Identify regional industry clusters and propose new methods to meet the needs of those clusters.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 1. Assess evolving local needs to determine the educational and information needs of local industry clusters.			
Task 2. Center management will work with other economic development organizations proactively as gaps are identified or as products provided are modified to cooperatively fill the need.			
Task 5. Develop strategic partnerships within service territories to assist in meeting the needs of local industry clusters.			
Task 6. Provide professional development for regional specific initiatives that are created to service local industry clusters.			

Goal 3. The Pennsylvania Small Business Development Centers will position itself as the premier statewide network providing entrepreneurs with the education, information and tools they need to successfully build their businesses.

Goal 3 is the marketing goal and most tasks are joint activities with the State Director's Office.

Objective 3:1

Improve marketing throughout the network to unify all efforts to communicate a consistent message to constituents.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
<p>Task 4. Promote and recognize entrepreneurship and small business development in Pennsylvania by actively nominating client companies for awards such as the Pennsylvania 50 Best Women in Business, the annual SBA Awards, the Pittsburgh 100, the Philadelphia 100, etc. and publicize those winners.</p>			
<p>Task 6. Identify established and high-growth businesses in each SBDC's service area and develop a customized marketing and networking effort focused on them.</p>			
<p>Task 8. Develop partnerships with organizations to reach targeted groups including college students; historically disadvantaged populations; veteran and woman entrepreneurs; the unemployed; and other populations emphasized by SBA & DCED.</p>			
<p>Task 9. Provide libraries with information on SBDC services for them to provide patrons.</p>			
<p>Task 10. Provide information on SBDC services to VFWs for them to provide their members.</p>			

Objective 3:2

Improve marketing to referral sources emphasizing SBDC services for established and high-growth companies and for firms in agri-business, travel and tourism, and manufacturing industries.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 3. Develop and implement a “beyond startups” statewide bank and other financial institutions outreach program identifying additional SBDC services available to target client segments.			
Task 4. Establish new relationships with organizations whose members or interests are aligned with those of targeted client segments.			
Task 5. Develop an enhanced marketing and education campaign to achieve closer relationships with statewide trade associations representing companies in the targeted client segments.			

Goal 4. The Pennsylvania Small Business Development Centers will enhance its service to clients by launching a statewide, fully operational knowledge management system.

Goal 4 tasks are joint activities to be undertaken by SDO and SBDCs.

Goal 5. The Pennsylvania Small Business Development Centers will secure new and additional revenue and resources in order to fulfill its mission and active its vision of the future.

Objective 5:2

Identify new funding sources and diversify sources of funding so that 10-20% of direct (cash) funding is from sources other than core program funds.

Task	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 5. Obtain funding support from businesses and organizations that have an interest in supporting SBDC initiatives and programs.			

Goal 6. The Pennsylvania Small Business Development Centers will be viewed by host institutions as highly valued contributors to the primary mission of the institutions, including public service, teaching and research.

Objective 6:3

Provide hands-on experience for students and faculty that integrates the SBDC into class activities as well as providing valuable internships.

Tasks	Action Taken (one or two line description)	Date Completed or Status	Comments
Task 3. Work with faculty to identify curricula gaps that the SBDC may assist in filling. This may involve interdepartmental work incorporating other disciplines such as environmental, engineering, political science, etc.			
Task 4. Work to increase awareness among faculty from various disciplines that the SBDC can provide linkages for hands-on experience for students with small business.			

Key Success Factor Exercise

Please use the listing of Key Success Factors to identify which factors might be instrumental in each of the following industries. List the factors you select in the order of importance, with the most important factor being first, and so on.

Remember that key success factors are what all firms in the industry must concentrate on doing well in order to compete effectively.

1. Automotive Industry

2. Fast Food Industry

3. Cosmetic Industry

4. Computer Industry

Listing of Key Success Factors:

Technology Related KSFs

- Scientific research expertise (important in such fields as pharmaceuticals, medicine, space exploration, telecommunications, energy, computers, and other high-tech industries)
- Production process innovation capability (technical capability to make innovative improvements in production processes)
- Product innovation capability
- Recognition by customers as a technological leader (expertise in a given technology)
- Capability to use the internet to disseminate info, take orders, deliver products or services)

Manufacturing Related KSFs

- Ability to achieve lower-cost operating efficiencies
- Ability to improve quality of manufacture (fewer defects, product failures, need for repairs)
- High utilization of fixed assets (important in capital intensive/high fixed-cost industries)
- Cheap access to key raw material inputs
- Low-cost plant locations (in areas where labor costs are low or in areas where shipping costs can be held to a minimum)
- Access to adequate supplies of skilled labor
- Ability to use nonunion labor
- Being able to capture manufacturing economies of scale
- Being able to capitalize on learning curve/experience curve effects
- Recruiting very qualified, highly productive employees
- Being vertically integrated backward into the production of important raw material/component inputs
- Low-cost product design and engineering

Distribution Related KSFs

- Building a strong network of wholesale distributors
- Gaining ample space on retailer shelves and displays
- Retaining the loyalty of distributors/dealers
- Having company-owned retail outlets
- Having low forward channel distribution costs

Marketing Related KSFs

- Having a well-trained, highly effective sales force
- Offering excellent after-the-sale service
- Providing technical assistance to buyers
- Prompt delivery
- Accurate filling of buyer orders (few back orders or mistakes)
- Clever advertising
- Reputation for quality
- Ability to come up with product innovations (something new or better, extra features, more options)
- Breadth of product line and product selection
- Merchandising skills
- A reputation for being customer-oriented and attentive to customer needs and preferences
- Attractive styling/packaging
- Customer guarantees and warranties

Other Types of KSFs

- Favorable image/reputation with buyers
- Recognition as a leader
- Convenient locations (especially important in many retailing businesses)
- Pleasant, courteous employees
- Access to financial capital (important in newly emerging industries with high degrees of business risk and in capital intensive industries)
- Patent protection
- Overall low cost (not just in manufacturing)

INTRODUCTORY SWOT I

What are our CURRENT Strengths?

What are our CURRENT Weaknesses?

What are our CURRENT OPPORTUNITIES (we have taken advantage of or we are about to take advantage of)?

What are our CURRENT THREATS?

INTRODUCTORY SWOT II

Which Strengths should we capitalize on or develop more in the future?

Which Weaknesses can we address immediately? How?

Which Opportunities do we see as most important to our mission/vision and survival?

Which Threats will have the largest impact on us in the next ____ years? How can we minimize them?

COMPETITIVE
ANALYSIS
ABC Company

	COMPETITORS			OUR COMPANY				
	XYZ	JKL	MNO		ABC			
	Service Uniqueness							
Service Quality								
Availability/Convenience								
Reputation								
Location								
Facilities								
Promotion								
Caliber Personnel								
Ability to Obtain Funding								
Pricing/Fees								
Overall Total	0	0	0	0		0	0	0

Below are two preliminary items to consider and respond to prior to a Strategic Planning session. It is important that you respond to these items on an INDIVIDUAL basis and bring your response sheets with you to the first session. Please consider each item carefully, and respond as honestly as possible. Your response may depend on your experience with the company (your length of time there), however, even if you haven't been with the company very long, simply consider the industry itself and use your knowledge of the industry to respond.

ITEM #1:

A. FOR OUR ORGANIZATION TO BE SUCCESSFUL, WE **MUST** BE GOOD AT THE FOLLOWING ACTIVITIES...

1. _____
2. _____
3. _____

PLEASE LIST ONLY YOUR TOP 1-3 CHOICES AND NO MORE.

B. THE WORDS I WOULD USE TO DESCRIBE THE ATMOSPHERE OF OUR COMPANY ARE: (Please prioritize in order from highest choice to lowest choice; use only as many words as you feel apply.)

1. _____
2. _____
3. _____
4. _____
5. _____

ITEM #2:

IF I HAD TO WRITE ONE SENTENCE TO DESCRIBE WHAT OUR COMPANY DOES IT WOULD BE:
