

# Strategic Planning



- o planning
- o calculating
- o managing



*Strategic planning is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy, including its capital and people.*

## SUCCESS IN BUSINESS . . . IS A PLANNED PROCESS



### PHASE 1 -- PRE-MEETING CURRENT BUSINESS MODEL ASSESSMENT

WE TAKE AN ANALYTICAL APPROACH TO HELPING CLIENTS BUILD AN ACCURATE STRATEGIC PLAN BY FIRST ASSESSING THEIR CURRENT BUSINESS POSITION.

Through our best practices databases, we complete a detailed financial analysis of the client's business and measure them against their industry competitors. Then we create an independent, non-biased business valuation of the client's business worth using a discounted cash-flow assessment and scorecard their marketing, sales and strategy process.

With this detailed background, we have a better understanding of the client's growth potential and use this information as a foundation for their plan development.



## PHASE 2 -- ON-SITE STRATEGIC PLAN DEVELOPMENT

HAVING AN IN-DEPTH UNDERSTANDING OF YOUR NEEDS AND GOALS IS FUNDAMENTAL TO THE WAY WE WORK WITH YOU.

Through a tactical 2-day one-on-one client workshop, we walk CEOs and their management team through an interactive discussion on their current business position and then hold an exploratory strategy session on where they want and need to go. Using the Value Forward methodology, we systematically help them build specific goal objectives, calculate corporate asset

requirements, and determine employee staffing needs and plan timelines needed to layout their strategic plan.

**“THE DIFFERENCE BETWEEN AN ENTREPRENEURIALY MANAGED COMPANY AND A PROFESSIONALLY MANAGED COMPANY -- IS PLANNING AND METRICS.”**

**PAUL R. DIMODICA**



## PHASE 3 -- MANAGING AND UNDERSTANDING

WE PROVIDE BEST PRACTICES AND COACHING ADVICE AND AN INTEGRATED REVENUE GROWTH APPROACH THAT CAN HELP YOU ACHIEVE YOUR CORPORATE GOALS

Once the on-site strategic planning session is completed, we regroup with all the data, client objectives, and business assumptions collected during the engagement and then write the strategic plan.

Once the plan is submitted, we then provide the CEO and the management team ongoing coaching and consulting on the plan's recommendations and implementation requirements.



**Gerhard Vierthaler**  
**CEO & President**

## **ABOUT THE VALUE STRATEGY GROUP**

The Value Strategy Group LLC is a Certified and Licensed Partner of the Value Forward Network, a worldwide management consulting firm with consulting partners in three countries. The Value Strategy Group works with growth-directed companies seeking to increase corporate revenue and profits. Using Value Forward<sup>®</sup> Sales and Marketing programs, we integrate financial management, marketing methodology, sales process, corporate strategy and operations into one outbound revenue capture program to help companies grow.

The Value Strategy Group uses a hybrid advisement model to help drive company's success. We are CEO Coaches, Executive Consultants, Financial Analysts and a Training Firm all at the same time. We advise CEOs on action steps to take to grow revenues, consult with management staff on best practices, analyze key financial figures of your business and train sales and marketing teams on tactics and strategies that work.

Our business approach is based on an analytical process using corporate sales and marketing best practices, benchmark models, third party research, and constant business process monitoring of sales and marketing management teams. Using this approach, we provide our clients with custom designed strategy, marketing and sales best practice programs that are tactically implemented and designed to increase revenue.

