

HIGH LEVEL STRATEGIC PLANNING

A top-level strategy map seeks to provide important insights into the most important elements of your success factors, opportunities, and challenges to formulate an actionable growth strategy.



DISCOVERY

Information about the firm's basic operating and economic performance provides insight into historical performance and reasonableness of plan assumptions. The information described in this scope is a starting point. In most instances, additional information is necessary to evaluate any planned strategic moves.

GOAL: Provide strategic advice supported by data and analysis

- Financial Information Request: Timekeeper reports, employee statistics, origination and client information, financial statements
- Survey Distribution: Strategic Goals and Expectations, Operations Assessment

RESULT: *A complete dataset*

ASSESSMENT

Once we have collected and analyzed the basic information set, we begin the assessment process. In this phase, we are measuring and evaluating the capability and performance level of the firm and its potential impact on any strategic goals.

GOAL: Recommend strategic moves that make sense

- Initial Financial Analysis (Optional)
- Trends and Competitive Factors
- Strengths and Challenges
- Follow Up Interviews

RESULT: *Financial, operational and strategic analysis*

STRATEGIC MAP

In this phase, the plan comes together into a succinct and easily understood document. Plans comprised of clear action steps significantly increase the likelihood of successful implementation. Our process strips the distracting filler information and creates a roadmap for everyone to follow.

GOAL: A roadmap to continued prosperity

- Institutional Definition: Vision and Mission
- Strategic Plan: Goals and Objectives, Strategies and Tactics

RESULT: *Growth plan*

DELIVERABLES

- **Strategy Map:** A graphical map of each component of the process, the important priorities and action plan
- **Financial Model (Optional):** A comprehensive model with intended production, fee income, payroll, expense and profit margin goals
- **Implementation Plan (Optional):** Project implementation task lists, milestones, schedules, and responsibilities

RESULT: *Guideline to realize the strategic plan*

