

Strategic Planning Checklist



A checklist to support your strategic planning.

Goal Setting	<input checked="" type="checkbox"/> Top-down approach: Based on the addressable near-term market. <input checked="" type="checkbox"/> Bottom-up approach: Based on historical company performance.
Benchmarks	<input checked="" type="checkbox"/> Benchmarks: Financial, Product, Industry, Market, Sales <input checked="" type="checkbox"/> Spend Analysis: ROI by Spend category
Priorities/Initiatives Impact Statement	<input checked="" type="checkbox"/> The impact analysis of your top priorities/initiatives on the business.
Strategic Plan	<input checked="" type="checkbox"/> Market share analysis <input checked="" type="checkbox"/> Customer share of wallet analysis <input checked="" type="checkbox"/> Scenario Model Analysis <input checked="" type="checkbox"/> Brand and Industry Position <input checked="" type="checkbox"/> Competitive analysis and intelligence <input checked="" type="checkbox"/> Analysis of various growth, partner, and corporate development options <input checked="" type="checkbox"/> Analysis of the return on spend
Forecast	<input checked="" type="checkbox"/> By market, product, partner, team
Budget	<input checked="" type="checkbox"/> By function, location, vendor
Sales Plan	<input checked="" type="checkbox"/> Customer account management plan <input checked="" type="checkbox"/> Partners and sources of alternative distribution plan and forecast <input checked="" type="checkbox"/> New Customer acquisition GoToMarket sales plan <input checked="" type="checkbox"/> List of top sales opportunities
Service Plan	<input checked="" type="checkbox"/> Service Model Benchmarks <input checked="" type="checkbox"/> Operations Team Staffing & Support Plan <input checked="" type="checkbox"/> Service Delivery Metrics across SLAs, NPS, KPIs

KEY PARTNERS Who are our key partners? Who are our key suppliers? Which key resources are we acquiring from our partners? Which key activities do partners perform?	KEY ACTIVITIES What key activities do our value propositions require? Our distribution channels? Customer relationships? Revenue streams? KEY RESOURCES What key resources do our value propositions require? Our distribution channels? Customer relationships? Revenue streams?	VALUE PROPOSITIONS What value do we deliver to the customer? Which one of our customers' problems are we helping to solve? What bundles of products and services are we offering to each segment? Which customer needs are we satisfying? What is the minimum viable product?	CUSTOMER RELATIONSHIPS How do we get, keep, and grow customers? Which customer relationships have we established? How are they integrated with the rest of our business model? How costly are they? CHANNELS Through which channels do our customer segments want to be reached? How do other companies reach them now? Which ones work best? Which ones are most cost-efficient? How are we integrating them with customer routines?	CUSTOMER SEGMENTS For whom are we creating value? Who are our most important customers? What are the customer archetypes?
COST STRUCTURE What are the most important costs inherent to our business model? Which key resources are most expensive? Which key activities are most expensive?		REVENUE STREAMS For what value are our customers really willing to pay? For what do they currently pay? What is the revenue model? What are the pricing tactics?		

Do you have
100%
confidence in
your plan?

ERGO Comps, LLC

D: 214.702.6427

www.ERGOcomps.com

Use Comps To Support Your Plan



Snapshot / Comps compares your existing business to industry benchmarks, such as your closest competitors. For the purpose of optimizing your strategy; comps uses benchmarking and scenario modeling to evaluate changes in spend and services to understand the impact on your strategic plan and forecast.

Call To Action

Use your Comps to drive change within your business:

- Demonstrate to your team the **change** you want
- Show how your **profitability** compares
- Set **benchmark** goals
- Visualize your competitive landscape and **positioning**
- **Upgrade** your service delivery model
- Change your spend and **productivity** expectations
- Change your **portfolio**

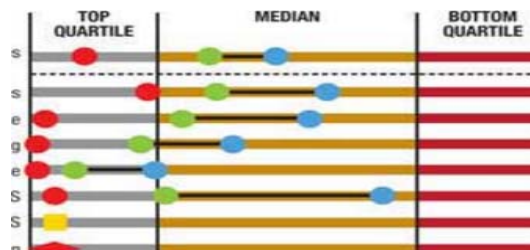
About / Comps provide market insights and competitive intelligence based on your industry comparables including financial, operational, workforce, sales, service delivery, portfolio, pricing benchmarks.

Comps supports your strategic planning, forecast, and spend decisions using:

Industry Benchmarking

Market Insights

Competitive Intelligence



Outcomes / Move from I think to I know with the actionable insights and benchmarks.

Comps are based on your top competitors, market, and industry for those businesses with your same Firmagraphics (*company demographics*), Buyergraphics (*your customer segments and buyer personas/types*), and Technographics (*Technology Stack and Tools used*) which means your comps are based on your size, location and other business model attributes unique to you.

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Comps Scope of Services Executive Summary



Our Approach to supporting your Strategic Plan.

Purpose / To identify the impact of various spend decisions impact on your business using industry benchmarks, market, and competitive intelligence.

Summary / Comps is an analysis of your business against your industry comparables. By evaluating your model and spend you will better prioritize which areas of the business to invest and optimize based on their impact to your business.

Goal / Based on your industry comparables provide market insights, competitive intelligence and actionable benchmarks to support your strategic planning and spend decisions.

Deliverable / The final presentation prioritizes key findings and connects strategic goals to recommendations based on your comps benchmarks.

Approach / Comps includes an analysis of your business against top industry comparables which similr size and busienss models. The analysis starts with the following:

1. Industry Benchmark analysis
2. ROI analysis of priority spend/investment decisions impact on the benchmarks
3. Forecast impact based on benchmark optimization and/or spend

Component	Objective	Recommendations
Benchmarks Analysis	Prioritize the initiatives based on benchmarks and their impact on profitability.	Market Gaps & Opportunities analysis: <ul style="list-style-type: none">• Partners, Portfolio, Capabilities, Competencies• Analysis of various options: By Market, By Product, By Partner, By Channel including Corporate Development: Make, Buy, Build, Partner, Acquire.
Your Plan	Define the plan based on the aforementioned opportunities to improve return.	Impact change recommendations based on profitability and return.

About / Our approach is collaborative, holistic, and cross-functional and based on industry market comps to identify areas to improve the profitability of the business. The analysis will size, rank and prioritize various strategic options based on their return and impact on your business. ***This approach ensures the analysis creates meaningful, significant opportunities that directly align with the profitability objectives of the business.***

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Why Comps / The goal of Comps is to support strategic planning using factual and empirical evidence.



Comps are used to identify and support:

- ✓ Market insights
- ✓ Industry benchmarks
- ✓ Competitive intelligence
- ✓ Sales planning and forecasting
- ✓ Business planning and budgeting
- ✓ Spend and expenses evaluation and selection
- ✓ How best to spend your resources
- ✓ Return on investment/spend decisions
- ✓ Change.



Why Comps based decision making:

- ✓ Only 1% of all firms last 10 years
- ✓ Most of the spend on technology is wasted, at best it's underutilized
- ✓ You cannot outspend your competition
- ✓ Aligning the CEO vision to execution requires change management
- ✓ Workforce enablement requires the application of a modern tech stack
- ✓ The most profitable firm wins!

benchmark comparables / How Do You Compare to These Benchmarks?

Benchmarks for **INC 5000 Award Winners** within your Industry, from private companies with \$2m to \$20m in annual recurring revenues, multiple locations, and a portfolio approach.

BENCHMARKS

	SCORE vs. BENCHMARK	Revenue Per Employee
	91% (36 months)	Customer Retention Rate (months)
	95%	Program Performance to Goal Accuracy
	SCORE BENCHMARK	Financial Operational KPI Metric
	1:3	Technology Expense to COGS Labor Spend Ratio

No matter how hard you work, you've got to outsmart the competition.



Comps based strategic planning support.
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