CARNELIAN CONSULT

Strategic Planning Guide

A practical sequence for producing a strategy that can actually be executed. It is written for leadership teams that already have ambition and need sequencing, ownership and measurement.

Step 1: Establish the current position

Begin with evidence rather than aspiration. Document performance, capacity, capability and the constraints that will still exist after the plan is signed.

- Financial and operational performance over the last three periods
- Customer and market position, including where you lose and why
- Organizational capability, structure and decision speed
- Delivery capacity: who is already committed to what

Step 2: Define a small number of priorities

A priority list that cannot be recalled from memory is not a priority list. Three to five strategic priorities is the practical limit for most organizations.

- State each priority as an outcome, not an activity
- Name a single accountable owner for each
- Define what will be deferred or stopped to create capacity
- Agree the measure that will show progress within one quarter

Step 3: Convert priorities into initiatives

Each priority becomes a small number of initiatives with scope, sequence and dependencies. Sequencing against real capacity is usually the highest value correction available.

- Sequence initiatives against the same scarce senior managers
- Identify dependencies before committing to dates
- Define the first ninety days for each initiative explicitly
- Attach a cost and a decision point to each

Step 4: Build the measurement architecture

Choose leading indicators that change before results do, and keep the reporting pack to one readable page.

- Two to four measures per priority, no more
- At least one leading indicator per priority
- A named owner for each measure and its data source
- A stated threshold that triggers a decision

Step 5: Install governance and review rhythm

Governance should be the lightest structure that still produces an honest status report.

• A monthly review that examines exceptions rather than restating status

• A standing decision log so questions are not reopened

• A blameless route for pausing or stopping an initiative

• Quarterly reallocation of capacity against progress

Step 6: Cascade the logic

Employees execute what they understand. Translate the strategy into what each team will start, stop and continue.

• Each team states its contribution in one sentence

• Individual objectives connect to a named priority

• Communication explains trade-offs, not only ambition

• Managers are equipped to answer the obvious questions

Step 7: Review and correct

Treat the plan as a live instrument. The purpose of review is correction, not defence.

• Quarterly review of priorities, capacity and measures

• Annual reset of the priority list

• Documented lessons that change the next planning cycle

• Explicit closure of completed or abandoned initiatives