



SUMMIT

STRATEGIC

Your Business. **Elevated.**



The Summit Way

At its core, strategic planning is the process of laying out the necessary steps to transform an organization into what it needs to be in order to best achieve the goals of its stakeholders. Strategic planning is one of the most universal and foundational elements of organizational performance. While the term often conjures up images of fanciful statements and thick documents which are rarely used, strategic planning has the potential to have a significant and long-lasting impact on the organization when it is done well. At the same time, because it can seem like such an overwhelming and difficult task, studies have shown that less than half of businesses and nonprofit organizations engage in regular strategic planning.

The good news is that while strategic planning can seem overwhelming at times, it can actually be a very manageable process when guided by experienced professionals. Summit has helped businesses and nonprofit organizations for years to better understand their potential and to develop a vision and strategy that can unite their entire team. If your organization is not fully realizing its potential, then we would encourage you to consider allowing Summit to walk with you through a process that has the potential to transform your organization.

PROCESS OF STRATEGIC PLANNING

Strategic Planning can be viewed similar to an instruction manual for assembling a machine. It should provide clear directions for assembly of all the component parts to build an efficient functioning machine designed to produce the specific desired product. Strategic Planning may utilize different processes, tools, reports and definitions throughout the creation of the plan but we should never lose sight of the simple purpose; the production of the desired result. Every planning process should incorporate four key elements.

Area	Potential Steps Involved	Deliverables
Situational Analysis	SWOT Analysis Financial Analysis Operational Assessments	Strategic Anchors Customer Value Proposition Business Definition
Vision and Goals	Company Surveys Client/Member Forums Employee Meetings	Vision Statement Mission Statement Values Statements
Plan Development	Best Practices Collection Meeting Facilitation Idea Evaluation	Action Plans Strategic Initiatives Key Performance Indicators Vision Timeline
Plan Execution	Team Updates Management Coaching Software Training	Performance Dashboard Interim Reports

Summit's Approach

Planning Model

Summit's Strategic Planning model is unique in its structure and focus. Over years of study, experience, and testing, our team has developed a framework that can allow organizations of any size and type to be able to focus on the planning areas that are the most relevant and crucial to their organization. This framework begins with identifying the organization's priorities for success and desired impact on stakeholders, and builds on those elements to develop a long-term vision and goals that the entire team can understand and is eager to support.



Summit's Services



The skills and resources of every organization are different. That is why Summit does not follow one single format for strategic planning engagements. Instead, Summit first identifies the needs and resources of the specific client, and then offers a tailored engagement design that best fits that client's needs, whether that entails leading the entire planning process from start to finish, or only assisting in one or two steps of the process. Whatever the organization's needs, Summit has the resources and expertise to provide the necessary assistance in any aspect of the strategic plan development and execution.

Facilitation Services

Many organizations have extensive planning experience and resources available within their current team and infrastructure. Even in those situations, the perspective and guidance of a third-party can be invaluable in ensuring that the planning process is able to develop a plan that adequately reflects all aspects of the organization's situation and environment. Summit consultants have experience in participating in and leading strategic plans for many different types of organizations and can bring that expertise to your organization's process.

Developing Strategic Guidelines

When many people think of strategic planning, they think of strategic guidelines and statements, such as Mission, Vision, and Values. While strategy is much more than that, developing strong statements can have a powerful effect on focusing and motivating your team. However, it is critical that those statements be developed in the right way and utilize input from a broad range of stakeholders, including employees, customers and partners. Summit's team is experienced in facilitating that process, from the gathering of feedback to refining the feedback into clear and concise statements. Summit can also help your organization identify and utilize best practices for communicating and adopting those statements into your organization's culture.

Summit's Services



Plan Design and Communication

Even the best vision for the future will have little impact on your organization's success without the right plan for reaching it. Summit can also assist with developing a full plan to serve as a road map for moving your organization closer to its goals. This plan should include both long-term and short-term strategies and goals, and should clearly communicate who is responsible for doing what. The plan should even provide for its own updating to ensure that it remains relevant. Furthermore, the plan should be communicated in a way that the team can understand and follow. Summit can help your organization identify the ideal format and process to fit the needs of your team, and provide for the greatest likelihood of plan success.

Executive Guidance for Plan Execution

The planning process does not end once the plan document has been written. Unless the plan is executed well, then the rest of the process will provide no value. Summit consultants know firsthand the challenges that can come during plan execution and can use that experience to help your organization develop processes to ensure that the plan is carried out, reviewed, tracked, and revised in a timely manner. In addition, we can help to institute continual improvement processes to ensure that your strategic planning becomes a regular part of your organization's culture.



The Summit Difference

The consulting team of Summit Strategic Consultants is comprised of professionals who have held a wide range of executive positions during their careers and are committed to using their experience and expertise to help organizational leaders best develop strategies and solutions to guide their own companies through the complex landscape of today's business environment. The diversity of our team allows us to connect you with the consultants who can best understand your unique needs, but all of our consultants are experienced in utilizing the vast range of Summit resources and processes to deliver lasting value to your organization.

Our consultants are distinguished not only by their professional knowledge, but also by their passion to serve our clients. Summit considers it an honor to be invited to assist organizations in developing and executing a strategy to leave their unique footprint on the communities in which they serve. If you are looking for ways for your organization to deliver the results that your stakeholders desire, both now and in years to come, we would encourage you to contact Summit to see how we might be able to assist you.



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