

STRATEGY PLAN GENERATOR

USER GUIDE

INTRAFOCUS ACADEMY

eBooks, presentations and tools to
help demystify strategic planning



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The Strategic Plan Generator

The strategic plan generator will help you create a plan following a tried-and-tested methodology. The tool provides help pages for every step and an example entry for every section and sub-section.

The following document will guide you through each section and sub-section and explain how to get the most out of the application.

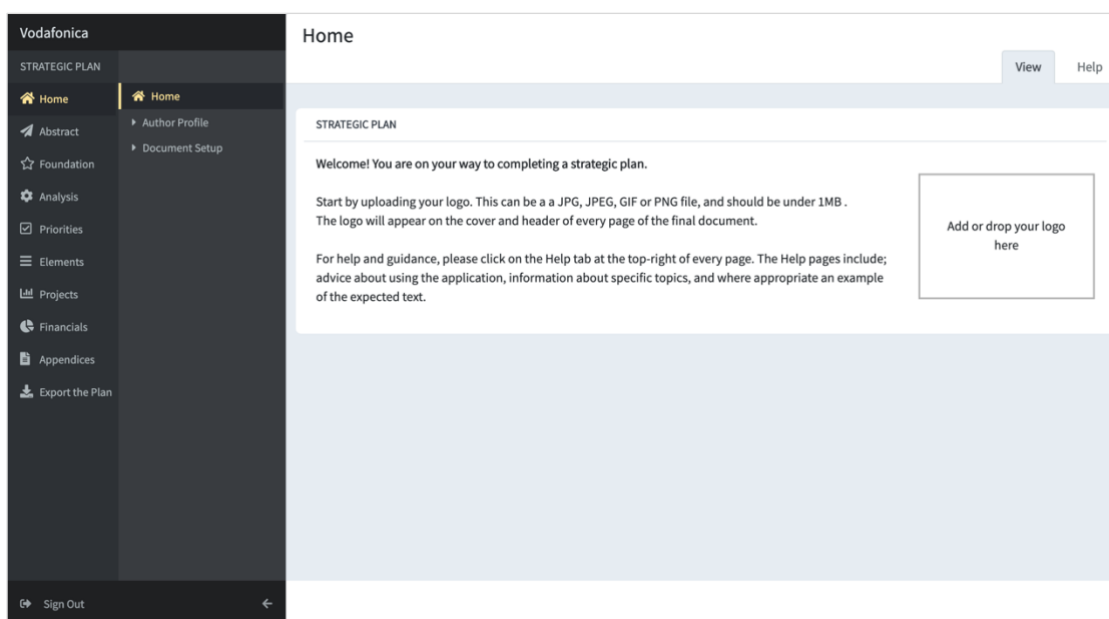
Home

Home Page

You will be presented with the home page upon entry to the application. You can add a logo by dropping an image into the box on the right.

The main navigation for each document heading is on the left. The sub-navigation is for sub-headings related to the main sections.

Important Note: Look to the top-right of the page. There is a View tab and a Help tab. These appear on every page. The Help tab provides contextual help for the application and the subject. You can also find an example by clicking on Help.



Author Profile

the Author Profile is a sub-menu. You can change your name and password in the author profile area. Your system author's name will not appear in the document. The document author can be added in the document setup area.

vodafone

STRATEGIC PLAN

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- Financials
- Appendices
- Export the Plan

Home

- Author Profile
- Document Setup

Sign Out

Author Profile

View Help

Username (your email address)
lukefrancis@intrafocus.com

First Name: Luke
Last Name: Francis

Password: Password
Re-type your password: Re-type your password

Cancel Save

Important Note: Be sure to click Save after any changes are made. The application does not automatically save your changes.

Document Setup

These fields will appear on the front page of the exported document. All text is in free form, so the entries will appear exactly as entered. **Tip:** if you have added a logo, you can leave the Organisation Name blank.

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Document Setup

View Help

Organisation Name: Vodafone
Creation Date: June 6th 2020

Address: 1 Park Road, Winchester, SO22 6AA, United Kingdom
Revision Date/Number: V001
Author: Luke Francis

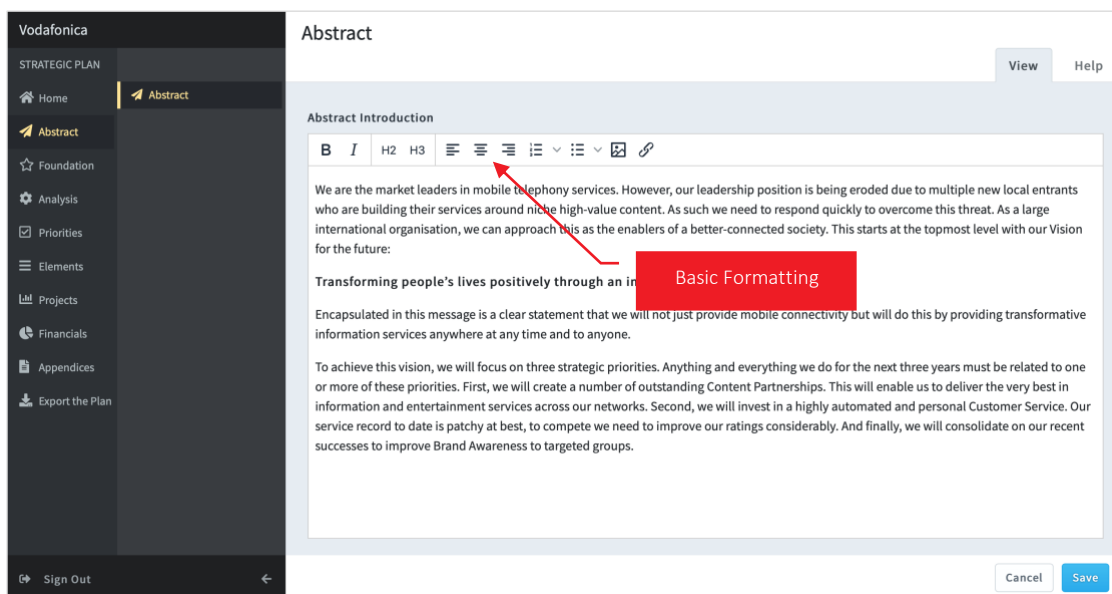
Cancel Save

Abstract

This section will appear at the front of the document before the Table of Contents. Although at the front, the abstract summarises the document's contents and is usually written last.

Editing Tools

The input box has some editing tools. It is essential to note the purpose of this tool is to guide you through the process of writing strategic content, not to create a beautiful document. We anticipate you will cut and paste the exported document into a 'branded' company template or add branding to the final document.



The screenshot shows the Vodafone abstract editor interface. On the left is a dark sidebar with the Vodafone logo and a 'STRATEGIC PLAN' menu containing items like Home, Abstract, Foundation, Analysis, Priorities, Elements, Projects, Financials, Appendices, and Export the Plan. The main area is titled 'Abstract' and has 'View' and 'Help' buttons in the top right. Below the title is a rich text editor toolbar with icons for Bold (B), Italic (I), H2, H3, bulleted list, numbered list, link, and unlink. A red arrow points from the text 'Basic Formatting' in a red box to the bulleted list icon in the toolbar. The editor contains three paragraphs of text: 'Abstract Introduction', 'Transforming people's lives positively through an in...', and 'Encapsulated in this message is a clear statement that we will not just provide mobile connectivity but will do this by providing transformative information services anywhere at any time and to anyone.' At the bottom right are 'Cancel' and 'Save' buttons.

Foundation and Analysis

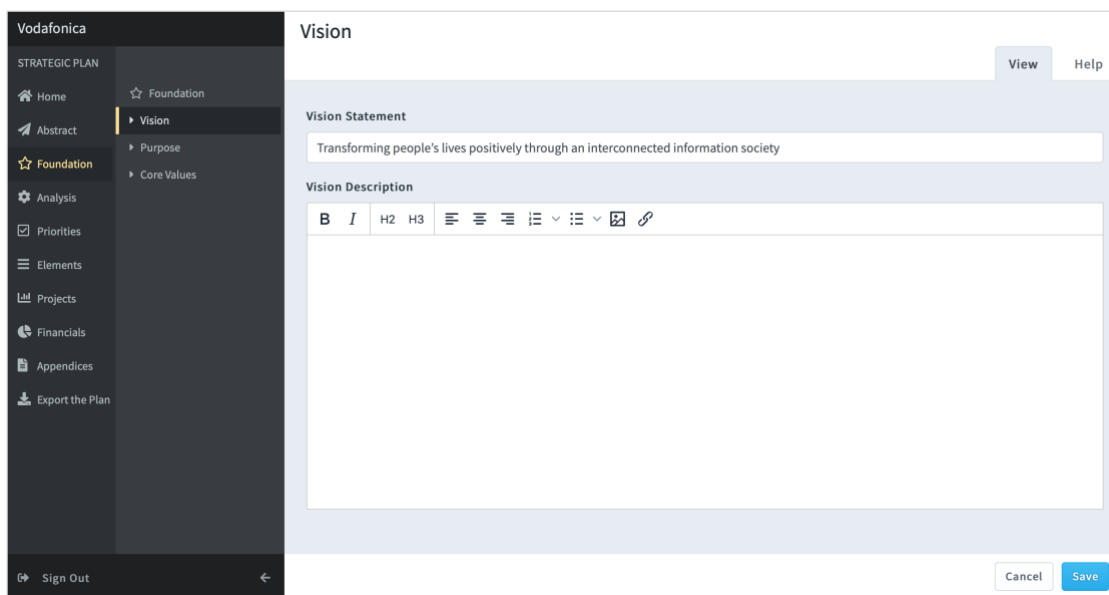
Foundation and Analysis are similar in format. Each section contains a fixed set of sub-sections. The main section will generate a main heading in the exported document. The sub-sections will generate sub-headings in the document.

You will be presented with a text area for the section introduction by clicking on a main menu item.

You will be presented with two text areas by clicking on a sub-menu item. The first allows you to enter a short statement, for example, a Vision Statement. The second larger area will enable you to enter a longer, optional description.

You do not have to add the section or subsection headings; these will be generated automatically.

Example of a vision statement with no additional description:



The screenshot displays the Vodafone Foundation and Analysis tool interface. On the left is a dark sidebar menu with the Vodafone logo at the top, followed by 'STRATEGIC PLAN' and a list of navigation items: Home, Abstract, Foundation (highlighted), Analysis, Priorities, Elements, Projects, Financials, Appendices, and Export the Plan. At the bottom of the sidebar is a 'Sign Out' button. The main content area is titled 'Vision' and contains two sections: 'Vision Statement' and 'Vision Description'. The 'Vision Statement' section has a text input field containing the text 'Transforming people's lives positively through an interconnected information society'. The 'Vision Description' section has a rich text editor with a toolbar showing options for bold (B), italic (I), heading 2 (H2), heading 3 (H3), bulleted list, numbered list, link, and unlink. At the bottom right of the main content area are 'Cancel' and 'Save' buttons.

Example of a purpose statement with an additional description:

The screenshot shows a web application interface for editing a 'Purpose' statement. On the left is a dark sidebar with the Vodafone logo and a 'STRATEGIC PLAN' menu. The menu items include Home, Abstract, Foundation (with a sub-menu for Vision, Purpose, and Core Values), Analysis, Priorities, Elements, Projects, Financials, Appendices, and Export the Plan. At the bottom of the sidebar is a 'Sign Out' button. The main content area is titled 'Purpose' and has 'View' and 'Help' buttons in the top right. It contains two text entry fields: 'Purpose Statement' with the text 'We will build a connected society' and 'Purpose Description' with a rich text editor toolbar (bold, italic, H2, H3, bulleted list, numbered list, link, unlink) and the text 'We will build a connected society that enhances socio-economic progress, embraces everyone, provides useful information and does not come at the cost of our planet.' Below this is a note: 'The two statements above will be used in our marketing and website literature.' At the bottom right of the main area are 'Cancel' and 'Save' buttons.

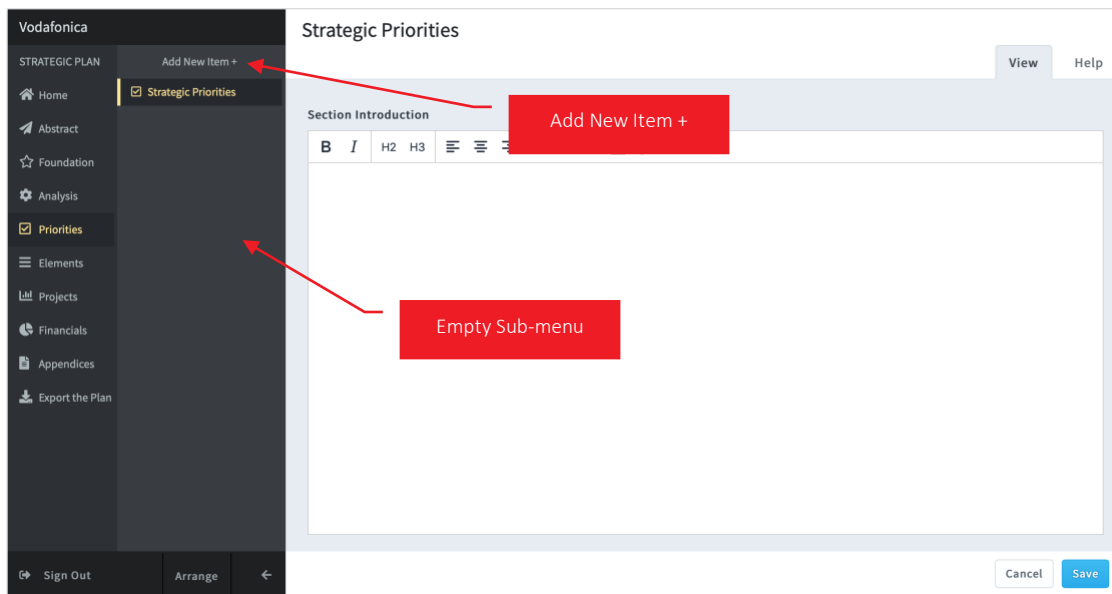
SWOT

Each Foundation and Analysis area follows the format above except for SWOT, which includes four separate text entry boxes for Strengths, Weaknesses, Opportunities, and Threats, respectively. There is also a free-form commentary box.

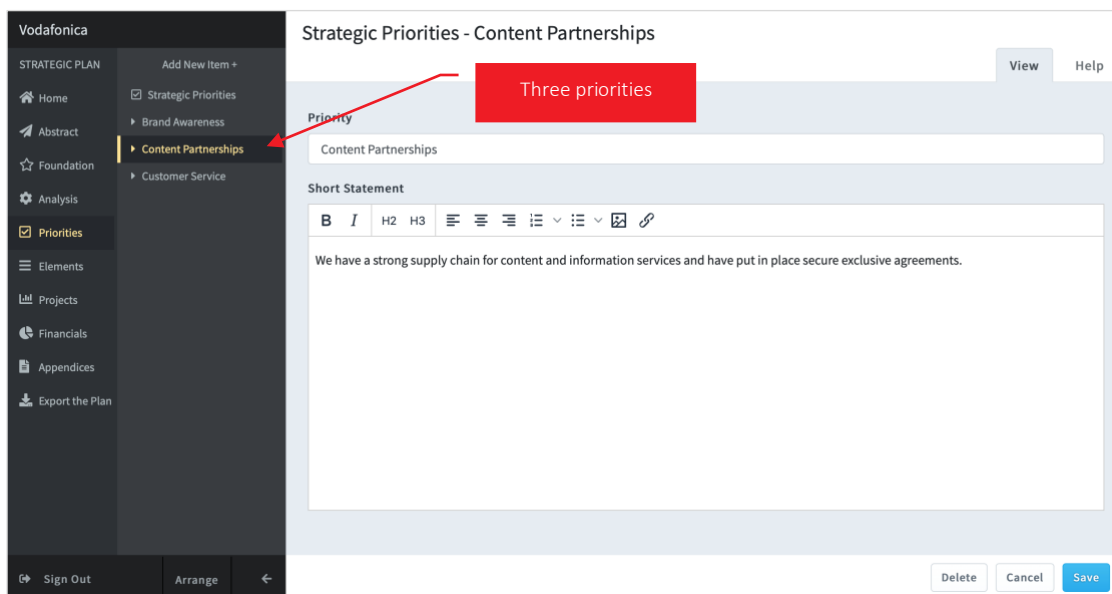
Priorities

You will be presented with the Strategic Priorities section introduction when you click on Priorities.

Important Note: There is an empty sub-menu. You can add as many priorities as required by clicking on **Add New Item +** at the top of the sub-menu



Example with three priorities added:





We recommend three strategic priorities as being optimum for a strategic plan. For more information on creating the content for your strategy, go to the Intrafocus [Strategic Planning Process \(SPP\)](#).

Objectives (and Measures)

In the objectives section, you can arrange your Objectives into 'Perspectives' and add 'Measures' (often called KPIs) to track the success of the Objectives.

To add a new Perspective, Objective or Measure:

Click on **Add New Item +** at the top of the list. It will default to **Perspective**; **select your desired element from the 'Element Type' drop-down.**

The order in which you create the Perspectives, Objectives and Measures does not matter. They can be arranged later by using the **Arrange** button at the bottom of the list to drag and drop items in the list. If you use Arrange, Save the changes using the blue Save button at the bottom right.

Perspectives

These are high-level containers of Objectives. A Perspective could be a theme, functional area, or geography. The labels you provide are entirely up to you. The critical thing to remember is that a perspective contains several Objectives. You **MUST** create at least one perspective before creating an Objective.

Select the Element Type **Perspective** to create a perspective

Objectives

These are business Objectives, not personal objectives. They are **NOT** projects or initiatives. Typically, a business objective is an improvement activity and usually starts with one of the following words: Improve, Increase, Decrease, Reduce, Strengthen, Enhance, Maximise, Minimise.

For example, 'Improve Sales Revenue' is a financial objective. 'Improve Customer Satisfaction' is a customer-based objective.

Read [Strategic Objectives](#) for more information on this subject. You **MUST** create at least one Objective before creating a Measure.

Measures

A measure, often called a KPI, measures how well you achieve an Objective. There may be multiple measures within an objective. We suggest you start small with one or two critical measures per objective. Measure usually appears under Objectives, but you can place them directly under Perspectives if you wish.

The image below shows an example of a completed Elements section:

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STRATEGIC PLAN Add New Item +

Home
Abstract
Foundation
Analysis
Priorities
Objectives
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Strategic Elements
Financial
Number of documents
Sales Cost Ratio %
Increase Profit
% Net Profit
Sales Revenue
Increase Revenue
ARPU
Decrease Costs
Net Profit £
Our Customers
Improve Clarity of Offering
Improve Market Perception
Satisfaction Rate
Improve Customer Sat
Customer Satisfaction
Throughput Index
Internal Process Changes

Strategic Elements - Objective - Increase Profit View Help

Element Type: Objective

Objective Label: Increase Profit

Objective Description and Expected Result

B I H2 H3 [List icons]

Increased total profit through the introduction of better content deals. Although we should not be completely prescriptive at this stage, our research indicates that football is likely to be a big revenue generator and therefore we suggest the first approach should be to the Football Association

Delete Cancel Save



Arranging Lists

You may have noticed the **Arrange** button at the bottom of the sub-menu. For sections where you can add items, you can also arrange them if you have created them in the wrong order.

Click on 'Arrange'. You will notice that the icons change. Drag and drop the items in the list to the correct position.

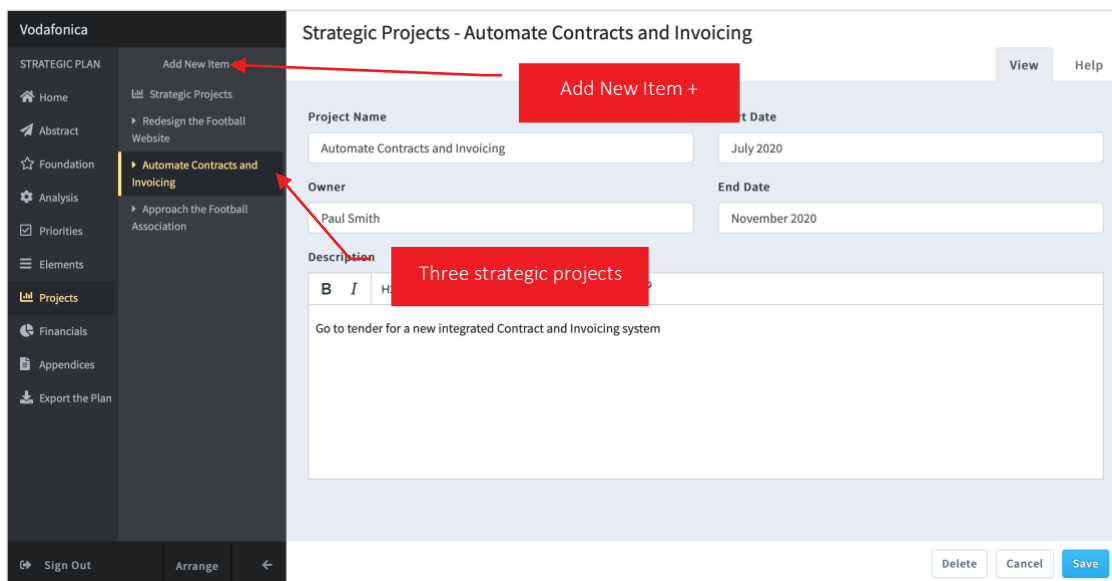
Important: When you have finished, click Save.

Projects

Projects work in the same way as Priorities. You will be presented with the Strategic Projects section introduction when you click on Projects.

Important Note: There is an empty sub-menu. You can add as many Projects as required by clicking **Add New Item +** at the top of the sub-menu.

The following example has three strategic projects added to the sub-menu:



Important Note: A corresponding Financial element will also be added whenever you add a Project. We assume that any Project has an associated cost.

Financials

You cannot determine the exact costs in a strategic plan, but you can make cost-benefit estimates.

As mentioned above, in projects, a financial entry will be generated automatically for every project. If you need to delete the item, you can. You can also add items if required.

Click **Add New Item +** at the top of the sub-menu and fill in the details. Below is an example of a completed Financial section:

Project Name or Cost Item	Expected Cost	Potential Benefit
Approach the Football Association	1,000,000	10's million

Notice that the financial elements are the same as the project elements.

Appendices

The Appendices section includes a single free-form text area. You can add anything you like to the Appendix. In this example, a heading, text and an image have been added:

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STRATEGIC PLAN

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- Appendices
- Abstract
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Sign Out

Appendices

View Help

Appendices

B I H2 H3 [List Icon] [Align Icon] [Link Icon]

Appendix 1 - Integrated Strategy Map

The following Integrated Strategy Map has been included for reference only. The map shows that a full set of business objectives, measures, targets and initiatives have been identified at the company level. Many of these will be cascaded as-is, some will be refined to suit the needs of our departments. The Integrated Strategy map will appear on the public intranet and will be posted on notice boards in selected areas.

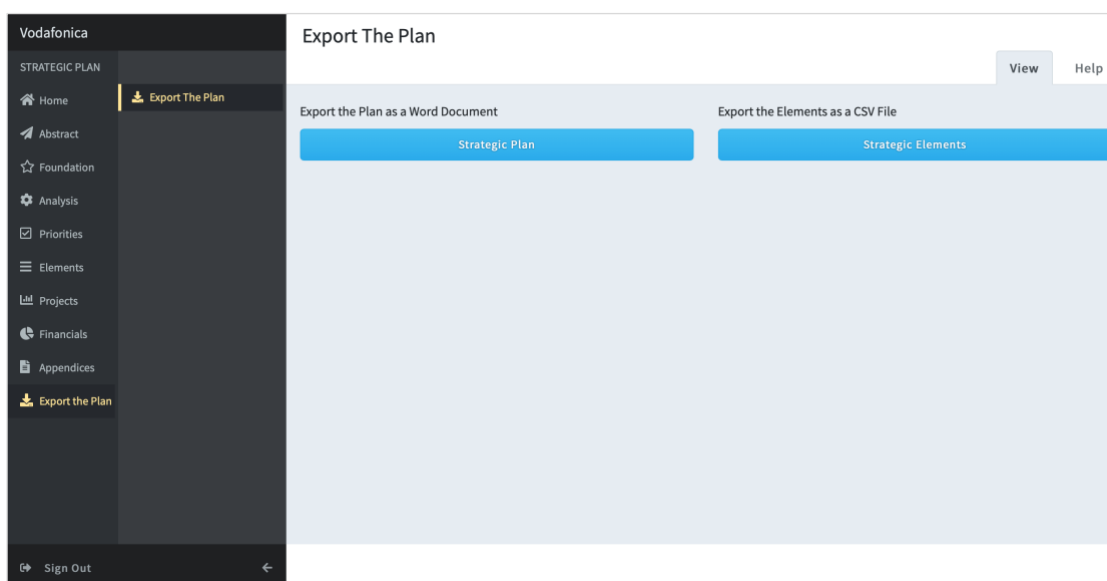
Vision	Transforming people's lives positively through an interconnected information society			
Purpose	We will build a connected society that enhances socio-economic progress, embraces everyone and does not come at the cost of our planet.			
Strategic Priorities	Content Partnerships	Customer Service	Brand Awareness	
Strategic Results	Strong supply chain for content and information services, exclusive agreements	Clarity in offering that surpasses anything in the market today, best user interface	Reinvigorated brand based on success, attract a wider and younger audience	
	Strategic Objectives	KPIs	Targets	Projects
Financial	<ul style="list-style-type: none"> Increase Revenue Increase Profitability Optimize Operating Costs 	<ul style="list-style-type: none"> Net profit Operating costs Revenue in target market 	<ul style="list-style-type: none"> + 1.5% per year + 1.5% per year + 1.2% per year 	<ul style="list-style-type: none"> Implement new financial accounting system Simplify billing operations Competitive and user requirements market studies for new 3G regions
Customer	<ul style="list-style-type: none"> Improve Clarity of Offering Improve Market Penetration Improve Customer Satisfaction 	<ul style="list-style-type: none"> % Market share index % Customer satisfaction index % New service user index 	<ul style="list-style-type: none"> + 2.5% per year + 85% this year + 80% each fiscal year 	<ul style="list-style-type: none"> Improve the Offering "next year" programme Conduct regional offering selection process Head start "prepare the Offering" programme Customer experience for new
Internal Processes	<ul style="list-style-type: none"> Innovation Performance Efficiency 	<ul style="list-style-type: none"> New products as % of sales 	<ul style="list-style-type: none"> + 12% this year 	<ul style="list-style-type: none"> Head start "prepare the Offering" programme Customer experience for new

Cancel Save

Export the Plan

Strategic Plan

You can export the plan at any stage, even on entry to the application. We recommend the first thing you do is fill in your details in the Document Setup sub-menu and export the plan. That way, you will see what the application provides and what you need to add. Just click on the big blue Strategic Plan button.



Strategic Elements

Using a Key Performance Indicator (KPI) management system like [Spider Impact](#), you can export your Strategic Elements into a spreadsheet format. Click on the big blue Strategic Elements button.

The spreadsheet will be constructed in the format required to build a scorecard in Spider Impact. It will not contain all the necessary information, but it will give you a perfect kickstart!



Thank You

Thank you for using the strategic plan generator; we hope you find it useful. If you have any questions or need help, please get in touch with us at any time via the Intrafocus Helpdesk page.

If you have bought this application via the Intrafocus website, then you should also check out our premium resources at the Intrafocus Academy of Strategic Planning: <https://www.intrafocus.academy/>