



# Strategic Planning



o planning

o calculating

o managing



*Strategic planning is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy, including its capital and people.*

## SUCCESS IN BUSINESS . . . IS A PLANNED PROCESS

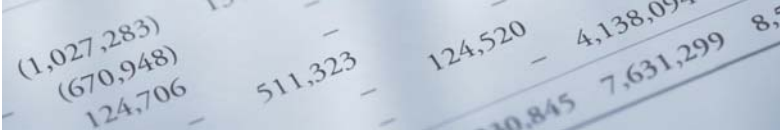


### PHASE 1 -- PRE-MEETING CURRENT BUSINESS MODEL ASSESSMENT

WE TAKE AN ANALYTICAL APPROACH TO HELPING CLIENTS BUILD AN ACCURATE STRATEGIC PLAN BY FIRST ASSESSING THEIR CURRENT BUSINESS POSITION.

Through our best practices databases, we complete a detailed financial analysis of your business and measure you against your industry competitors. Then we create an independent, non-biased business valuation of your business' worth using a discounted cash-flow assessment and then we scorecard your marketing, sales and strategy process.

With this detailed background, we then understand better the client's growth success potential and use this information as a foundation for their plan development.



## PHASE 2 -- ON-SITE STRATEGIC PLAN DEVELOPMENT

HAVING AN IN-DEPTH UNDERSTANDING OF YOUR NEEDS AND GOALS IS FUNDAMENTAL TO THE WAY WE WORK WITH YOU.

Through a tactical 2-day one-on-one client workshop, we walk CEOs and their management team through an interactive discussion on their current business position and then hold an exploratory strategy session on where they want and need to go. Using the Value Forward methodology, we systematically help them build specific goal objectives, calculate corporate asset

requirements, and determine employee staffing needs and plan timelines needed to layout their strategic plan.

**“THE DIFFERENCE BETWEEN AN ENTREPRENEURIALY MANAGED COMPANY AND A PROFESSIONALLY MANAGED COMPANY -- IS PLANNING AND METRICS.”**

**PAUL R. DIMODICA**



## PHASE 3 -- MANAGING AND UNDERSTANDING

WE PROVIDE BEST PRACTICES AND COACHING ADVICE AND AN INTEGRATED REVENUE GROWTH APPROACH THAT CAN HELP YOU ACHIEVE YOUR CORPORATE GOALS

Once your on-site strategic planning session is completed, we regroup with all the data, client objectives, and business assumptions collected during the engagement and then write your strategic plan.

Once your plan is submitted, we then provide the CEO and the management team ongoing coaching and consulting on the plan's recommendations and implementation requirements.





**Suzie DeBusk**  
**President and CEO**

## **ABOUT CxO VALUE PARTNERS**

We are a management consulting firm that works with senior executive teams to integrate financial management, strategy, marketing and sales into one outbound revenue capture program to increase corporate revenue. We do this by assessing the value your customers see and the value you think you have and then measure the "value variance" gap between the two. Once we have identified the "Value Variance" between the two, we then make appropriate strategic and tactical recommendations on your corporate strategy and marketing programs to close the gap. When this is completed, we then train your sales team to sell to management more effectively using techniques that are linked to our recommendations.

