

# Strategic Plan Blueprint.

Turning Vision Into Measurable Results

May 7, 2026





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Director, Special Initiatives

# Agenda

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- Why Strategic Planning is Critical
- How to Build a Strategic Plan
- Turning Strategy into Action
- What's Next

# Common Challenges

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- Volatile supply chains
- Talent sourcing and development
- Rising costs
- Capital investment challenges
- Margin pressures



# Poll

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## Which best describes how you operate today?

- We have a clear strategic direction that guides all our decisions
- We have a strategy; however, day-to-day pressures override it
- We have a strategy; however, we continue to struggle with competing priorities across functions
- Our strategy shifts regularly due to customer, workforce or supply disruptions

# Strategic Planning is Critical

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- Directs capital planning
- Forces clear decision on product approaches
- Shapes alignment between your customers and your operations
- Improves risk management
- Sets clear priority on resource utilization
- Defines your approach to gain competitive advantage

# Strategic Plan

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An intelligent allocation of **resources** through a unique system of activities to achieve a goal.



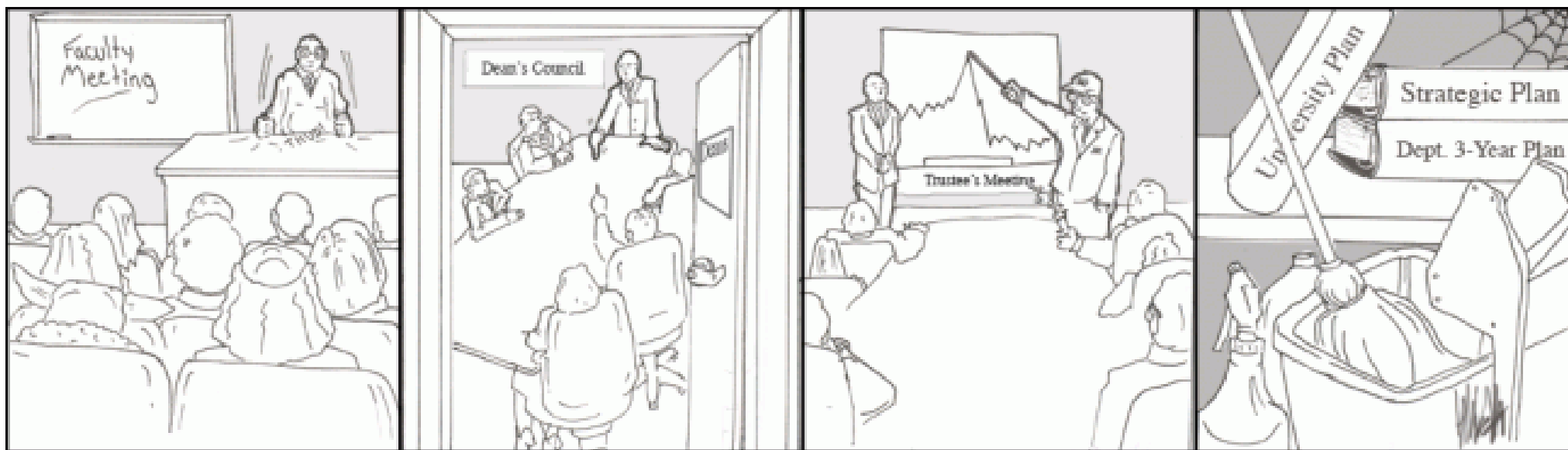
# Without a Strategic Plan

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- Capital investments are driven by urgency - not a plan
- Workforce may not be aligned to automation or other efficiency programs
- Margins erode due to scattered priorities



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"What happens to all of the strategic plans?"

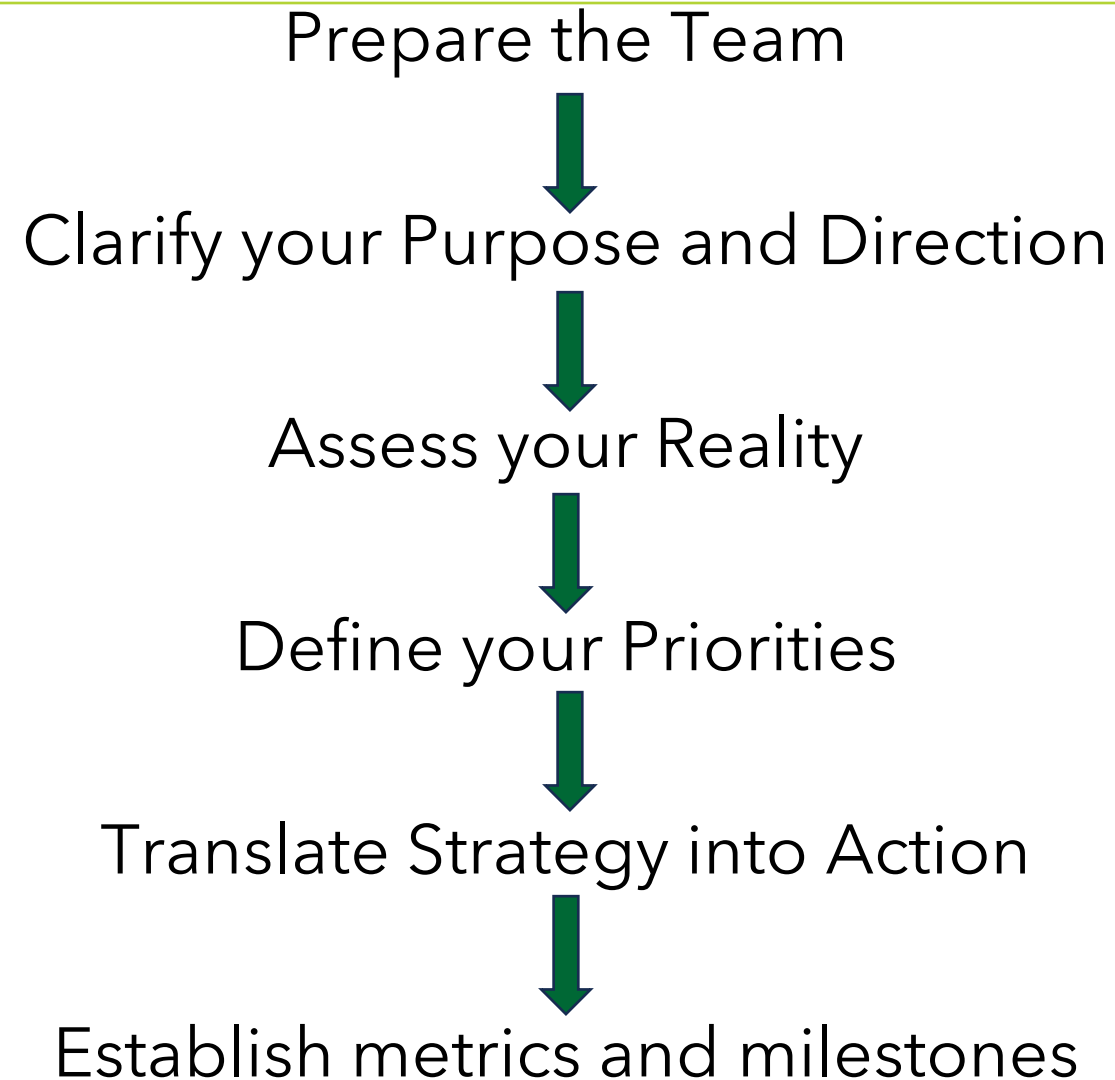
# Components of a Strategic Plan

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# Process

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# Prepare your Team

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- Plan to make tradeoffs and say NO to some to some choices
- Leadership should get input from the rest of the team along the way
- Commit to implementing the strategy.
- Plan for regular, intentional check ins throughout the year.



# Organizational Purpose: Mission

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Clarifies what you are all about

Helps define boundaries for the vision

Consider your competitive advantage

Foundation for the rest of the plan

*Hint: You may already have this defined. Check out the "About" tab on your website*

# Future Expectations: Vision

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What customers do you *want* to serve?

What channels to market do you *want* to use?

What competitors do you *want* to face?

What geography do you *want* to cover?

What partners do you *want* to work with?

*NOTE: Should be hard to do but not impossible.*

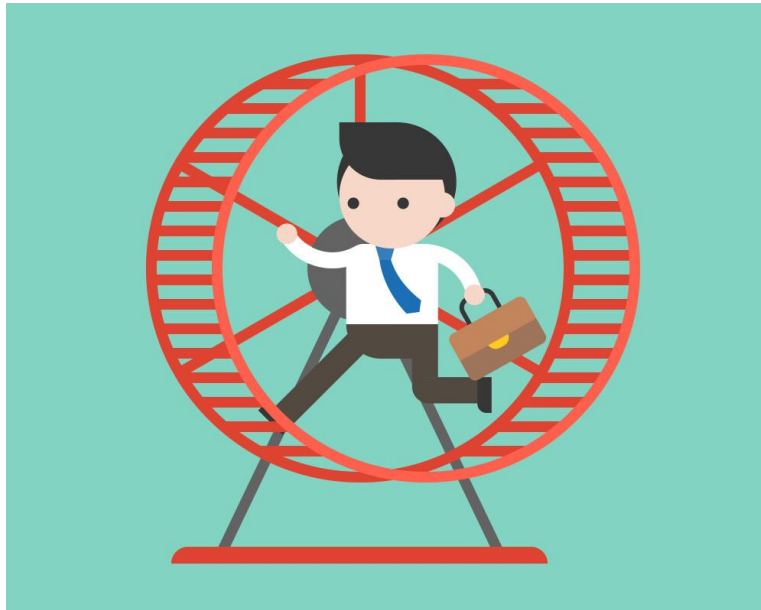


# Don't

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Fail to *intentionally* choose

Think you have to stay where you are



# Values

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- Foundational beliefs against which you can measure yourself
- Determine boundaries that shouldn't be crossed

Values describe behavior toward

- People
- Customers
- Suppliers
- Employees
- The Community

# Assess Your Reality

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- Focus on facts
- Be honest with yourself
- Identify constraints
- Understand your risks
- Leverage your advantages



# SWOT (Internally Focused)

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## Strengths

- *Better than others*
- *Different from others*
- *Your competitive advantage*

Keep and Improve

## Weaknesses

- *Something you do well but doesn't add value*
- *Cause of customer complaints*
- *Inefficiencies that cost time or money*

Prioritize and address

# SWOT (Externally Focused)

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## Opportunities

- *Trends*
- *Changes in technology*
- *New regulations*
- *Competitor activity*

## Threats

- *Trends*
- *Changes in technology*
- *New regulations*
- *Competitor activity*

Note: You typically don't have much control over these. However, they can have positive or negative influence over your business and they must be evaluated and addressed.

# Define Your Priorities: Strategies

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- What management systems are required to achieve the vision?
- What 3-5 things must happen in order for you to achieve your vision?
- How do you leverage your strengths to stand out from the competition?
- Which weaknesses do you improve?
- How will you manage the risks from outside forces?



# Strategic Focus

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***“People think focus means saying yes to the thing you’ve got to focus on. But that’s not what it means at all. It means saying no to the 100 other good ideas that there are. You have to pick carefully.”***

Steve Jobs  
CEO Apple

# Check Yourself

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Will all our strategies, taken together, allow us to achieve our vision?

Have we forgotten something?

# Translate Strategy into Action

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- All employees should have accountabilities that tie to the strategic plan
- Executives should own the plan
- Team should understand how their initiatives tie back to strategic success
- Regular checks should be made on progress
- Revisions may be needed as you learn more

# Establish Metrics

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- Set metric targets based on the level of the organization
  - *Plant manager will have different metrics than the employee working in the cell*
- Review metrics regularly
  - *Consider gemba walks, metric boards for regular problem solving around the results*
- Celebrate the wins!

# You Can't Do it All

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All employees need to be engaged

*I* should understand how *I* contribute to the plan

Communication is key

Take a lesson from advertising

- *7x before you understand a billboard*
- *20x before someone will buy the product*



# Success

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- Your strategy and execution alone will not guarantee success.
- You operate within the context of competition.
- The most innovative strategy will fail if your competitors outmaneuver you.
- You must constantly revisit your strategy within the context of what is changing around you.



# Mary's Words of Wisdom

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Just say "NO"

Strategy is not just about execution, it is also about clear decisions

You cannot over-communicate

Remove your blinders



# Act Now

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Protect your margins

Control risk

Invest with confidence

Leverage your resources effectively



***Unplanned decisions are often the most expensive ones***

# Next Steps

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- Assess your current strategy
  - *Will it get you where you want to go?*
  - *Does your team understand how to achieve it?*
- Identify conflicting priorities
  - *Have you set clear priorities?*
  - *Have you said "NO" to enough priorities?*
- Commit leadership time to strategy


# Thank You!



Share your feedback

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**Mary Hallock**

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