



**Entrepreneur
& Family**
BUSINESS COUNCIL

Strategic Planning

MODULE ONE





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ODEA |  **TRYBL**



A low-angle, upward-looking photograph of several modern skyscrapers with glass facades, reaching towards a clear blue sky. The perspective creates a sense of height and scale.

Why Strategy Matters

ALIGNMENT

FOCUS

PRIORITIZATION

What a strategic plan is – And isn't

Long-term roadmap that sets the direction of your business.

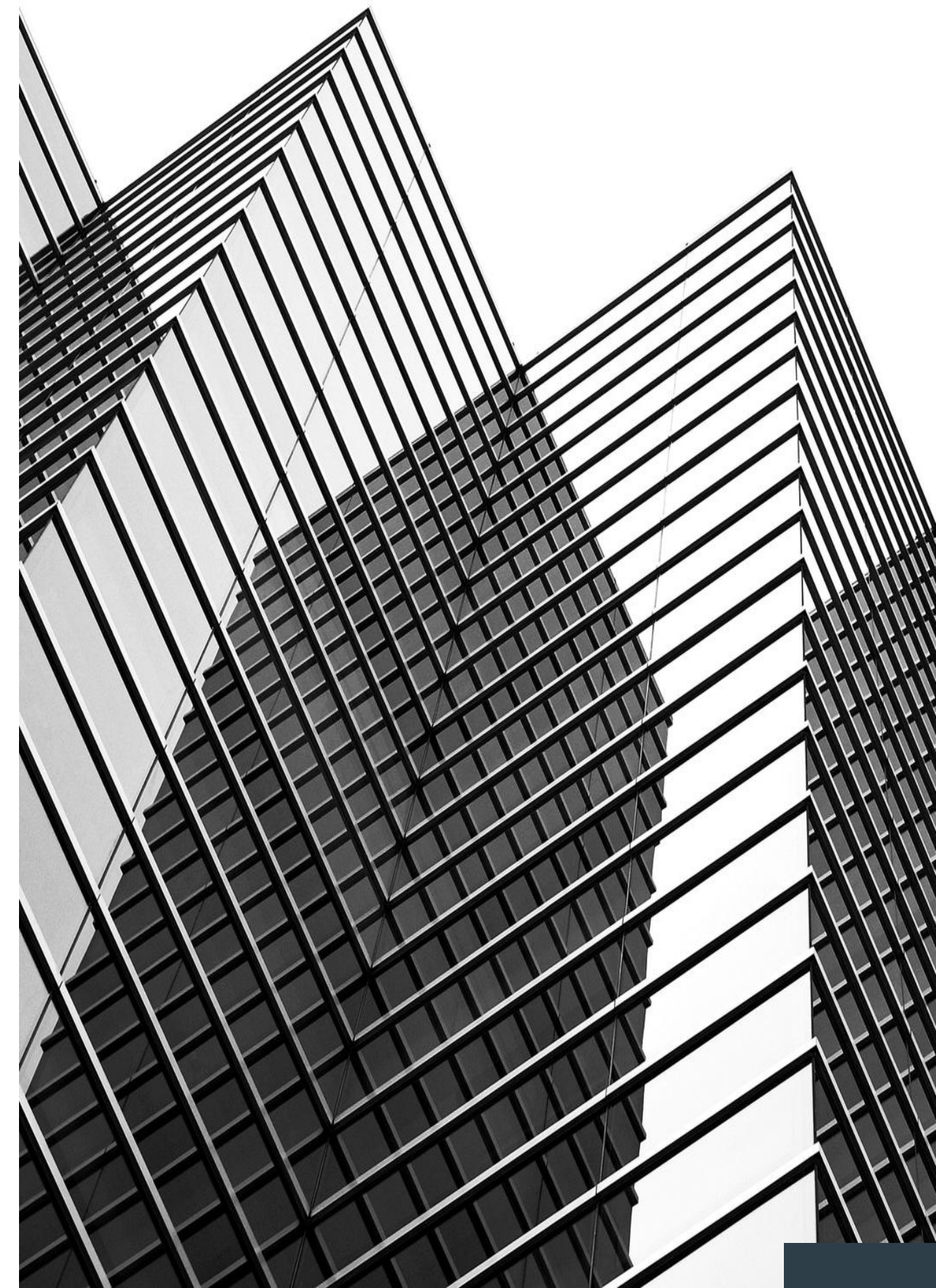
Defines what you're building, what you need to focus on to get there, and how you'll measure progress along the way.

It is the bridge between your vision (why you exist and where you're going) and your day-to-day operations (how you actually run the business).

≠ Go-to-Market

≠ Mission/Vision/Values

≠ Annual Operating Plan (AOP)



Foundations of a Strategic Plan

Vision | Mission | Values

Focus Areas (Pillars/Themes)

Goals → Strategies → Tactics

KPIs & Metrics

Resources & Timeline

Monitoring & Adjustment



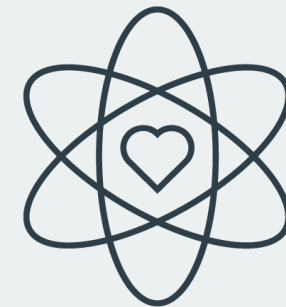
Vision, Mission, Values



VISION
WHERE ARE WE
GOING?



MISSION
WHY DO WE
EXIST?



VALUES
HOW DO WE
BEHAVE?

Strategic Focus Areas



Goals → Strategies → Tactics



KPIS & Metrics

A goal without a plan is just a wish.
And a plan without metrics is just hope.

LEADING &
LAGGING
INDICATORS

BASELINE
→ TARGET

CADENCE +
OWNERSHIP

COST TO
MEASURE

Resources & Timelines



WHO OWNS
WHAT →
ACCOUNTABILITY



**BUDGET &
CAPACITY**



MILESTONES
(QUARTELY,
SEMI -ANNUAL,
FISCAL)



Monitoring & Adjustment

CADENCE

- Monthly; 45 minutes, KPI review and blockers.
- Quarterly; 90 minutes, strategy review and reallocation.
- One page scorecard, one owner per KPI, one update per initiative

PIVOT TRIGGERS

- Pre agree what counts as a dig in moment vs a pivot moment
- KPI misses for two periods
- External shocks

LIVING DOCUMENT

- Set a simple rhythm and stick to it.
- Use Stop, Continue, Change format

COMMON PITFALLS

- Reviewing numbers without decisions
- Changing goals every month, or never changing at all
- Too many KPIs, no single source of truth, unclear owners

A One-Page Template for Writing Your Plan

VISION
ONE SENTENCE

FOCUS AREAS
3-5

**FOR EACH
FOCUS AREA:**

- 1 Goal
- 2-3 Strategies
- 3-5 Tactics
- KPIs (lead + lag pair)
- Owner + Milestones

Great Strategies Require External Components

COMPETITIVE LANDSCAPE

CUSTOMER INSIGHTS

MARKET/INDUSTRY TRENDS



Additional Strategy Development Facilitations

SWOT

NOW-NEXT-NEVER

DEATH OF A COMPANY

START-STOP-STRENGTHEN



A photograph of a modern glass skyscraper with many windows, reflected in a calm body of water. The building is on the left side of the image, and the reflection is clear and sharp. The sky is a pale blue.

SWOT or Death of a Company – 15-Minute Sprint

Choose: SWOT *or* Death of a Company

Task: Work solo or in pairs

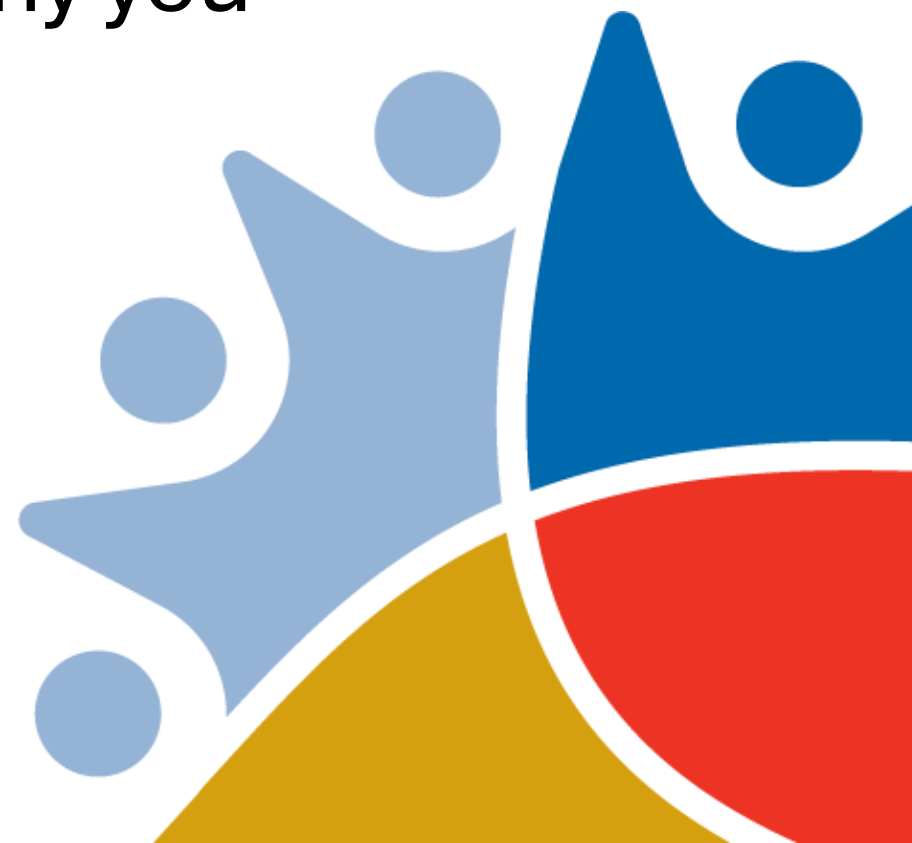
Output: 2 themes + 1 risk + 1 action

Time: 15 min work → 5 min share

The Power of Focus

Your Strategic Plan is the long-term roadmap that sets the direction of your business. It defines what you're building, what you need to focus on to get there, and how you'll measure progress along the way.

The bridge between your vision (why you exist and where you're going) and your day-to-day operations (how you actually run the business).



Alignment.
Focus.
Prioritization.

Presenter Contact Info



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