



Strategic Planning for In-plants

How to write your own strategic plan

Sponsored by



Write a five-year strategic plan with minimal time & effort that is useful for running your in-plant

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Agenda

- Background
- Barriers & Overcoming Them
- What Plans Look Like
- How to Develop a Plan
- How to Use It

Thank You

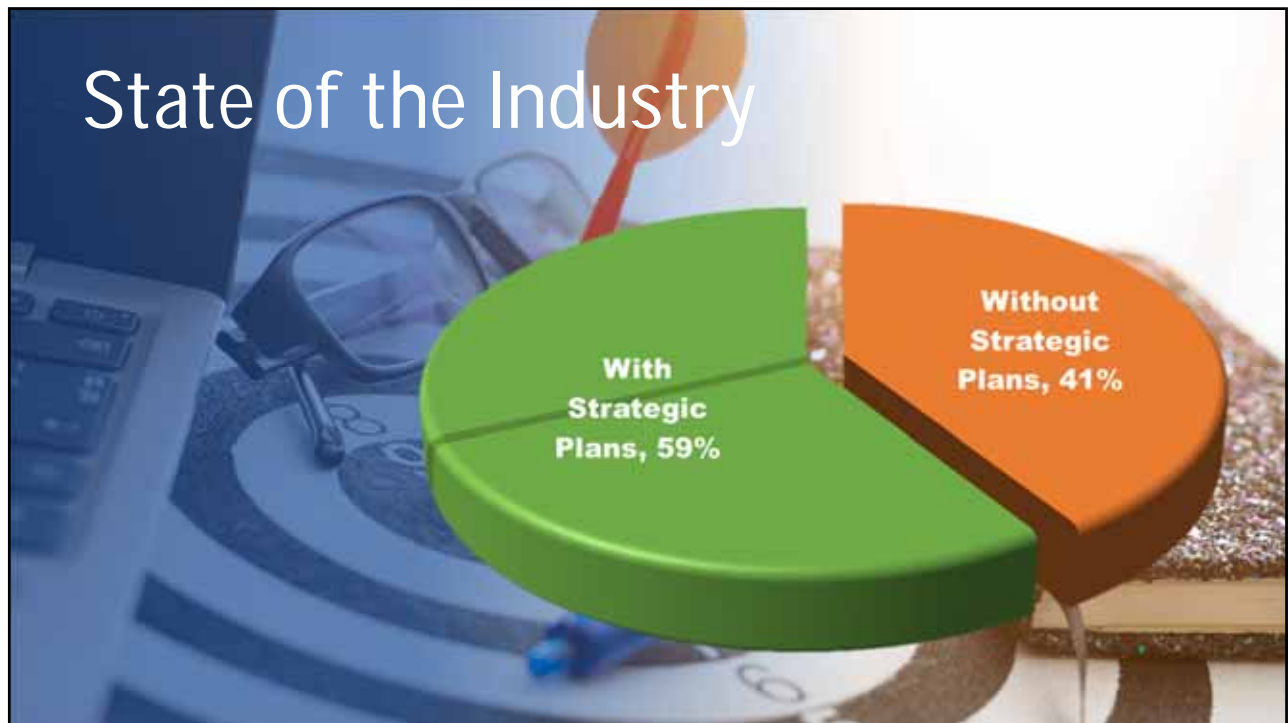
- Canon
- IPMA Management
- IPMA Members



The Need

- **Equipment & Facilities**
 - Equipment, Facilities & Funding
- **Players**
 - Staff & Training
- **Playbook & Game Plans**
 - Strategic & Execution Plans

5





• Unwritten

Examples

- Unwritten
- Bullet List

- Ensure quality time to market for all products & services to maximize operational efficiency and resource utilization across regions.
- Provide a scalable and flexible operational model for print services.
- Ensure consistent product quality across all regions and print operations.
- Enhance and standardize customer coverage and support globally.
- Optimize customer engagements to ensure work is appropriately prioritized.
- Leverage technology solutions that will enhance our customer's experience, improve productivity and synergize print operations globally.
- Identify and maintain KPI's and metrics.
- Continue to lead from the front by demonstrating inclusive leadership by seeking out diverse points of view and taking steps to advance our commitment to Diversity and Inclusion.

Examples

- Unwritten
- Bullet List
- Management Exercise

Print and Mail Center STRATEGIC PLAN OBJECTIVES

Mission: To deliver highest value products and services with dedicated staff who embrace continuous improvement

| OBJECTIVES | DELIVER HIGHER VALUE PRODUCTS AND SERVICES | EMBRACE CONTINUOUS IMPROVEMENT | |
|------------|--|--|--|
| | <ul style="list-style-type: none"> 1) Provide unique knowledge in global, floor-specific, media-wide 2) Deliver cost-effective, high quality, unique media solutions | <ul style="list-style-type: none"> 1) Contribute to strategic revenue growth efforts and initiatives 2) Demonstrate accountability through effective management practices | |
| PROCESSES | <p>EXPLORE NEW BUSINESS OPPORTUNITIES, SERVICE LINES, AND TECHNOLOGIES</p> <ul style="list-style-type: none"> 1) Collaborate with internal areas for print and digital innovative solutions 2) Help drive innovation and discover new products & services 3) Increase internal marketing efforts 4) Identify clients for performance capabilities | <p>INCREASE PRODUCTIVITY</p> <ul style="list-style-type: none"> 1) Improve unit time (print) in order to work to capacity 2) Maximize staff and equipment utilization with productivity 3) Introduce PFI with shop-wide consistency, standard equipment, regularly | <p>MANAGE COSTS</p> <ul style="list-style-type: none"> 1) Measure fully loaded costs and metrics (internal and external) 2) Track and measure against various metrics 3) Leverage technology to improve efficiency |
| PEOPLE | <p>PROVIDE CAREER ENHANCEMENT OPPORTUNITIES</p> <ul style="list-style-type: none"> 1) Develop cross training within and among areas 2) Bring formal classes and training to floor level as well as for leaders for staff 3) Implement regular team building activities | | |

PERFORMANCE MANAGEMENT PLAN

FY 2019-20
Department of Personnel & Administration
July 1, 2019

Examples


- Unwritten
- Bullet List
- Management Exercise
- Justifications

Examples

- Unwritten
- Bullet List
- Management Exercise
- Justifications
- Reviews

Examples

- Unwritten
- Bullet List
- Management Exercise
- Justifications
- Reviews
- Plans



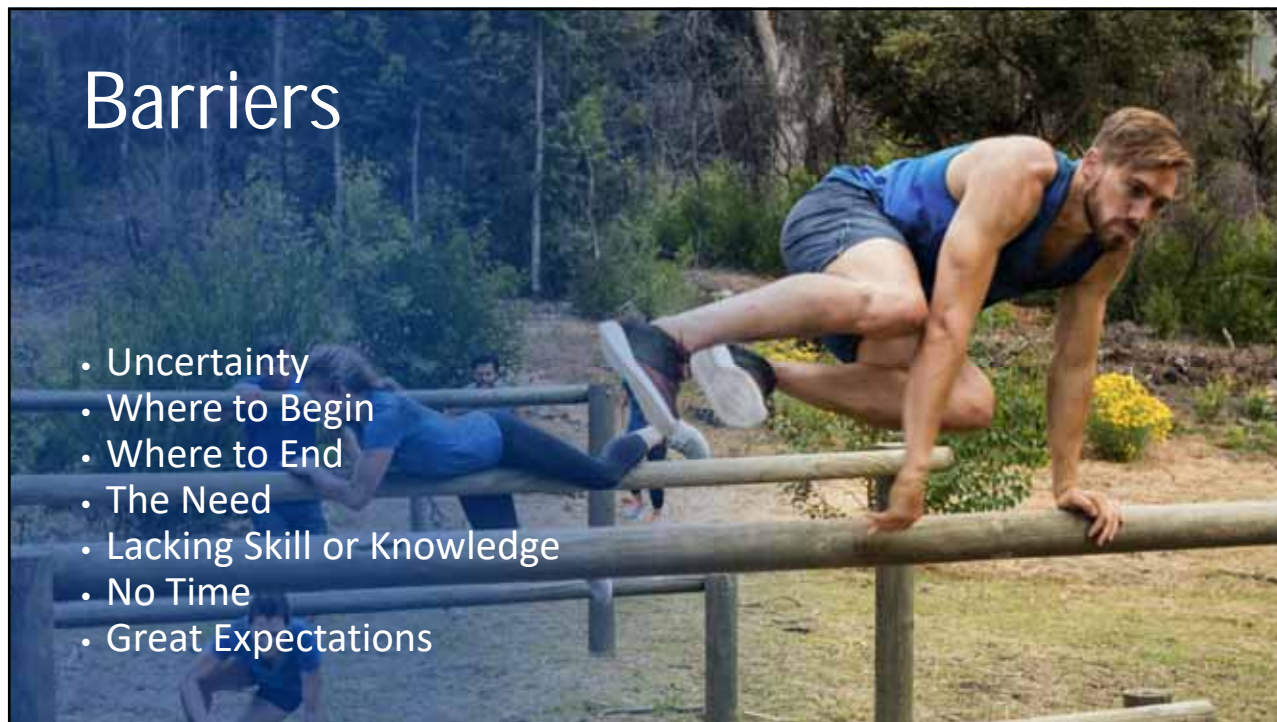
The document contains the following sections:

- PART I: PROFIT & GAIN SERVICES MESSAGE**
 - 1. Mission Statement
 - 2. Vision Statement
 - 3. Core Values
- PART II: GENERAL GOALS AND OBJECTIVES**
 - 4. Financial Objectives
 - 5. Operational Objectives
 - 6. Customer Objectives
 - 7. Human Resource Objectives
 - 8. Environmental Objectives

Observations

- Not useful for running your shop
- Most missing goals, objectives & initiatives
- All missing targets, milestones and investments





Strategic Plan Contents

- **Mission**
 - Alaska Airline's Mission**

"Our objective is to be one of the most respected U.S. airlines by our customers, employees, and shareholders. We believe our success depends on our ability to provide safe air transportation, develop relationships with customers by providing exceptional customer service and low fares, and maintain a competitive cost structure to compete effectively. It is important to us that we achieve our objective as a socially responsible company that values not just our performance, but also our people, our community, and our environment."
- What your operation currently does for your institution *from your customers' or institution's perspective*
- Where you are today
- The starting point of your plan

Strategic Plan Contents

- Mission
- Positioning
- Your mission, combined with your target audience and your competitive differentiation
- 1-2 sentences that succinctly describe:
 - What you do
 - Who you support
 - Why customers select you over other alternatives

Strategic Plan Contents

- Mission
- Positioning
- Vision
- The direction you want to take your business
- Your desired mission statement in five years
- This is your target

Amazon's 1995 Vision

"Our vision is to be Earth's most customer-centric company; to build a place where people can come to find and discover anything they might want to buy online"

Strategic Plan Contents

- Mission
 - Positioning
 - Vision
 - **Goals**
- Broad, open-ended directional statements that support your mission and vision
 - Areas in which you need to work to move from your mission toward your future vision

Strategic Plan Contents

- Mission
 - Positioning
 - Vision
 - Goals
 - **Objectives**
- Tangible and measurable statements of intended accomplishments associated with a goal
 - Includes
 - Measurement criteria (KPIs)
 - Annual targets

Strategic Plan Contents

- Mission
- Positioning
- Vision
- Goals
- Objectives
- KPIs
- Key Performance Indicators
- Accurately-measurable characteristics of relevant progress toward completing objectives

Strategic Plan Contents

- Mission
- Positioning
- Vision
- Goals
- Objectives
- KPIs
- Measurements /Targets
- The current and target values for each objective's KPI
- Every year in your 5-year plan needs a target
- This year is the measurement of your current status

Strategic Plan Contents

- Mission
- Positioning
- Vision
- Goals
- Objectives
- KPIs
- Measurements /Targets
- **Initiatives**
- Anticipated major activities supporting objectives
- Includes
 - Estimated investments
 - Significant milestones

Strategic Plan Contents

- Mission
- Positioning
- Vision
- Goals
- Objectives
- KPIs
- Measurements /Targets
- Initiatives
- **Milestones/Investments**
- The target accomplishments and anticipated significant investments for each initiative
- Each year you plan to work on an initiative needs milestones
- Specific, but high-level

Strategic Plan Contents

- Mission
- Positioning
- Vision
- Goals
- Objectives
- KPIs
- Measurements /Targets
- Initiatives
- Milestones/Investments
- **Justification**
- Background material supporting your goals, objectives, initiatives, milestones, and targets
- Justifies your statements
- Appears in appendices, if needed

Strategic Plan Structure

- **Executive Summary**
 - In-plant overview
 - Operational overview
 - Mission/vision/positioning
 - Strategic plan summary
 - Goals
 - Objectives
 - Initiatives
 - Without detailed targets, milestones & investments

EXECUTIVE SUMMARY

WHO WE ARE

OUR MISSION
We deliver the printing-related services essential for ACME Industries' success.

OUR POSITION
For departments needing communications with internal employees, branches, or end customers, we deliver the printing-related services essential for them to succeed. Departments choose us for our professional quality and service as well as our unmatched costs and delivery times for projects ranging from POS and institutional signage, to direct marketing campaigns, to fleet management of departmental multi-functional printers.

OUR VALUES

- Continually capture and keep loyal customers
- Attract, retain and support talented and engaged employees
- Always provide high value to the corporation with whatever we do

ABOUT US
A few sentences or paragraphs describing your positioning, services, history, awards, recognition, etc.

WHERE WE ARE HEADED

OUR VISION
Become the preferred provider of all printing-related services needed by every ACME Industries division and department.

ABOUT OUR VISION
A few sentences or paragraphs explaining your vision statement

ACME INDUSTRIES' GOALS

Goal 1) Provide best in-class products to our customers
Goal 2) Maintain market share leadership
Goal 3) Deliver expected profitability to our shareholders

HOW WE SUPPORT ACME INDUSTRIES
A few sentences or paragraphs on which organizational objectives you support and how what you do supports them

SUMMARIZED STRATEGIC PLAN

Goal 1) Provide professional and quality graphic communication products and services

Objective 1.1) Provide print-related services most needed by ACME Industries
Initiative 1.1) Select and acquire a wide-format press
Objective 1.2) Deliver jobs within promised deadlines
Initiative 1.2) Evaluate and, if appropriate, implement a print MIS system

Goal 2) Provide financial savings for departments needing graphic communication products and services

Objective 2.1) Deliver competitively advantaged pricing
Objective 2.2) Improve awareness of our services and capabilities
Objective 2.3) Increase utilization of our services
Initiative 2.1) Evaluate and, if appropriate, implement a website with an online storefront
Initiative 2.2) Evaluate and, if appropriate, implement a Print MIS system and production automation software

Strategic Plan Structure

- Detailed Plan
 - Mission/Vision
 - Goals
 - Objectives with KPIs & Annual Targets
 - Initiatives with Annual Investments & Milestones

DETAILED STRATEGIC PLAN

GOAL 1: PROVIDE PROFESSIONAL AND QUALITY GRAPHIC COMMUNICATION PRODUCTS AND SERVICES
 Print-related communications for customers, prospects, employees, and dealers is necessary for ACME's business success. ACME Industries produces and uses a massive quantity of signage, direct mailings, brochures, notices, or other types of documents. These materials' quality and branding compliance must always support the quality of our company. This goal and the related objectives directly support corporate goals 1 & 2 to maintain market/area leadership and to deliver expected profitability to our shareholders.

OBJECTIVE 1.1: PROVIDE PRINT-RELATED SERVICES MOST NEEDED BY ACME INDUSTRIES
 ACME departments have evolving print-related services needs. Document Services constantly strives to advise, understand and meet those needs in a professional manner. Document Services will survey internal departments to identify their prioritized document services needs and work to meet them.

| Objective KPI: Customer surveys on prioritized services | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|-------------|-------------|--------------|--------------|--------------|--------------|
| 7 of top 20 | 7 of top 20 | 9 of top 20 | 10 of top 20 | 11 of top 20 | 12 of top 20 | 12 of top 20 |

INITIATIVE 1.1: SELECT AND ACQUIRE A WIDE-FORMAT PRESS
 Our departments are increasingly needing large-format printing for POS signage, vehicle wraps, displays and other applications. This is high-margin work which represents significant potential corporate benefits if brought in-house.

| | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------|------|----------------------|----------|------|------|------|
| Mileposts | | Evaluation completed | Acquired | | | |
| Investments | | | \$12,000 | | | |

OBJECTIVE 1.2: DELIVER JOBS WITHIN PROMISED DEADLINES
 Much of our work requires tight deadlines. Our dedicated focus on ACME departments as our customers along with our corporate campus location enable us to meet these stringent requirements. Document Services will accurately specify and meet job deadline agreements. Document Services tracks data such as rejects and missed deadlines. We use that information to measure our effectiveness.

| Objective KPI: Job delivery tracking output | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|------|------|------|------|------|------|
| 87% | 90% | 93% | 97% | 98% | 99% | 99% |

INITIATIVE 1.2: EVALUATE AND, IF APPROPRIATE, IMPLEMENT A PRINT MIS SYSTEM
 Print MIS systems could provide an opportunity to streamline our operation in ways which would reduce out-turnaround times. This could help meet ever-tightening deadlines while controlling costs.

| | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|-------------|------|----------------------|-----------------------|--------------|---------------|------|
| Mileposts | | Evaluation completed | Acquired, implemented | 40% utilized | 100% utilized | |
| Investments | | | \$90,000 | | | |

GOAL 2: PROVIDE FINANCIAL SAVINGS FOR DEPARTMENTS NEEDING GRAPHIC COMMUNICATION PRODUCTS AND SERVICES
 Paragraph or two description

OBJECTIVE 2.1: DELIVER COMPETITIVELY-ADVANTAGED PRICING
 Paragraph or two description

| Objective KPI | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------|------|------|------|------|------|------|
| Current | +1 | +2 | +3 | +4 | +5 | +5 |

OBJECTIVE 2.2: IMPROVE AWARENESS OF OUR SERVICES AND CAPABILITIES
 Paragraph or two description

| Objective KPI | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------|------|------|------|------|------|------|
| Current | +1 | +2 | +3 | +4 | +5 | +5 |

OBJECTIVE 2.3: INCREASE UTILIZATION OF OUR SERVICES
 Paragraph or two description

| Objective KPI | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---------------|------|------|------|------|------|------|
| Current | +1 | +2 | +3 | +4 | +5 | +5 |

INITIATIVE 2.1: EVALUATE AND, IF APPROPRIATE, IMPLEMENT A WEBSITE WITH AN ONLINE STOREFRONT
 Paragraph or two description

| | 0 | +1 | +2 | +3 | +4 | +5 |
|-------------|---|----|----|----|----|----|
| Mileposts | | | | | | |
| Investments | | | | | | |

Strategic Plan Contents

- Supporting Information
 - Operational overview description
 - Operations data, such as budget, staffing, equipment, capabilities, etc.
 - SWOT & LACE diagrams
 - Industry trends and data
 - Peer in-plant comparisons
 - Competitive pricing
 - Historical trends
 - Desired product proposals
 - Anything else




Developing Your Plan

- Start with what you know
 - Institutional goals & objectives
 - Current in-plant initiatives
- Write your mission, positioning & vision statements



Developing Your Plan

- Not one way to do this
- Iterative process
- Be sure to end it



Developing Your Plan

- **SWOT Analysis**
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats
- **LACE Analysis**
 - Leverage
 - Address
 - Capture
 - Eliminate



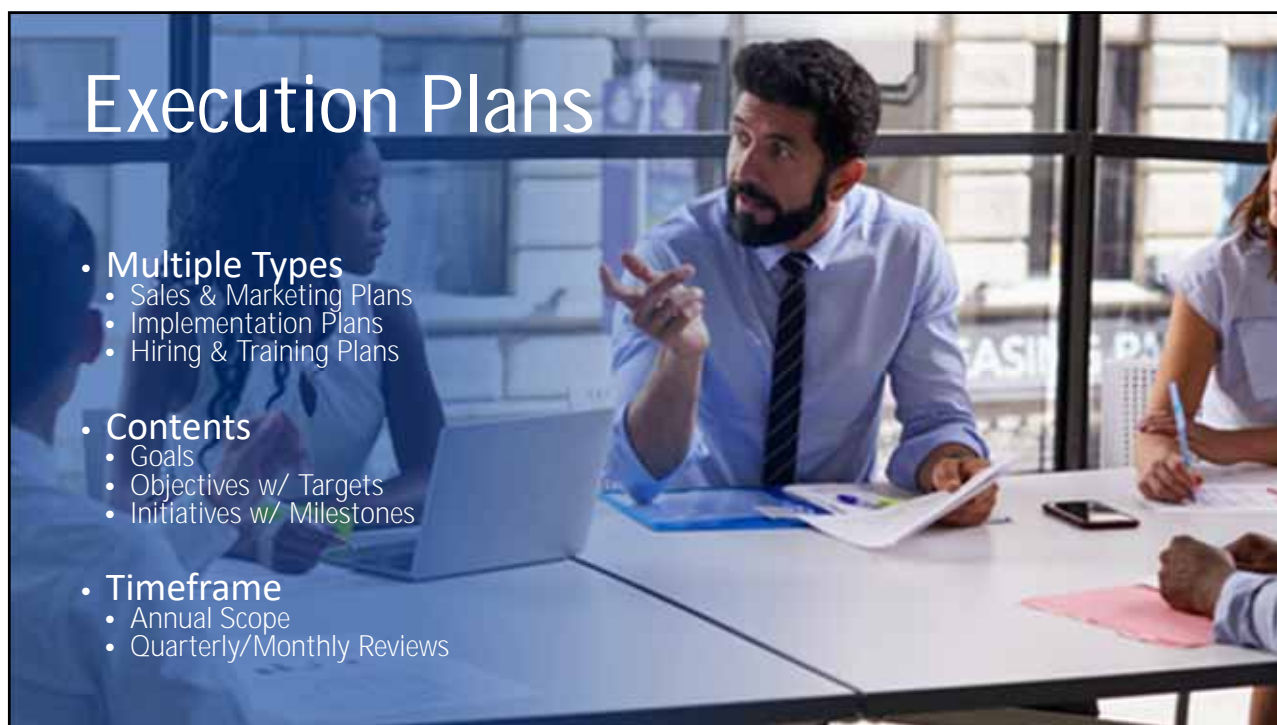
Developing Your Plan

- **Translate into objectives**
 - Determine measurement methods
- **Group Similar Objectives Under Goals**
- **Identify Key, Supporting Initiatives**
- **Filter & Prioritize Objectives & Initiatives**
- **Add Targets, Milestones & Investments**
- **Research & Iterate**
- **Stop when it stabilizes**



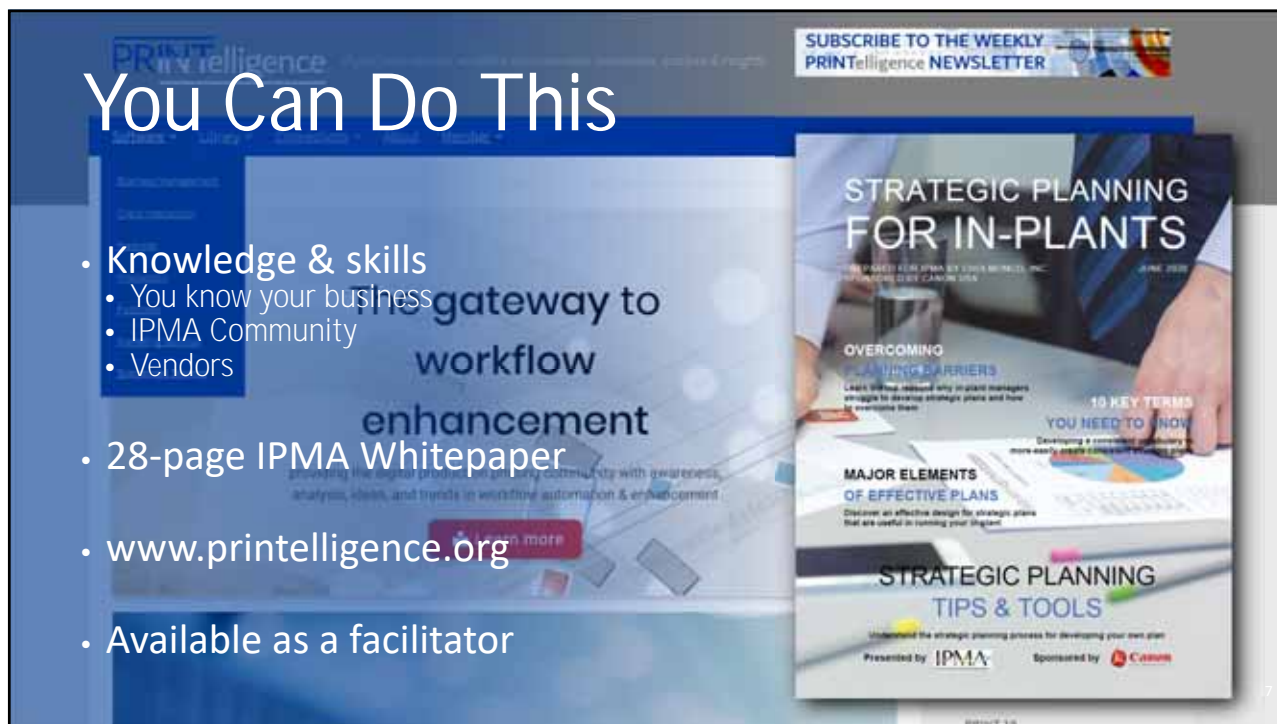
Next Steps

- **Validate**
 - Staff
 - Customers
 - Management
- **Measure Progress & Review Annually**
- **Revise & Extend Annually**



Execution Plans

- **Multiple Types**
 - Sales & Marketing Plans
 - Implementation Plans
 - Hiring & Training Plans
- **Contents**
 - Goals
 - Objectives w/ Targets
 - Initiatives w/ Milestones
- **Timeframe**
 - Annual Scope
 - Quarterly/Monthly Reviews



The image shows a screenshot of a website on the left and a whitepaper cover on the right. The website has a blue header with the 'PRINTelligence' logo and navigation links. The main content area features the text 'The gateway to workflow enhancement' and a 'Learn more' button. The whitepaper cover is titled 'STRATEGIC PLANNING FOR IN-PLANTS' and includes sections like 'OVERCOMING PLANNING BARRIERS', '10 KEY TERMS YOU NEED TO KNOW', 'MAJOR ELEMENTS OF EFFECTIVE PLANS', and 'STRATEGIC PLANNING TIPS & TOOLS'. It is presented by IPMA and sponsored by Canon.

You Can Do This

- Knowledge & skills
 - You know your business
 - IPMA Community
 - Vendors
- 28-page IPMA Whitepaper
- www.printelligence.org
- Available as a facilitator



The background of this slide is a photograph of several people in business attire sitting around a table, looking at documents and charts. Overlaid on this image are the logos for PRINTelligence CONSULTING, IPMA (In-Plant Printing and Mailing Association), and Canon (SEE IMPOSSIBLE).

Questions & Discussion

Sponsored by **Canon**
SEE IMPOSSIBLE

Presented by **IPMA**
In-Plant Printing and Mailing Association

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