

# Strategic Planning: Roadmap for Success Self-Study Webinar (10 Hours)

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Self Study Webcast  
Aug 18

## **Overview:**

Effective strategic planning requires an organization to know where it's going and how to get there. This insightful self-study webinar will guide you on the road to developing and executing an effective strategic plan for greater success and improved competitive advantage. You'll discover how to:

- Create and implement well-conceived strategies
- Evaluate your organization using SWOT (Strengths, Weaknesses, Opportunities & Threats)
- Choose the best performance metrics
- Incorporate operational plans, goals and objectives
- Connect the strategic plan to your budgeting and forecasting processes
- Manage and control through feedback

## **Objective:**

To provide financial professionals with the knowledge and skills to develop and implement an effective strategic plan. Through SWOT analysis, Key Performance Indicators, operational plans, and other contributing factors, you will learn to understand, manage and control the processes of crafting a successful strategic plan for your organization.

[Detailed Learning Objectives](#) [1]

## **Emphasis:**

- Why you need a strategic plan
- Organization mission, values and principles
  - Core values
  - Guiding and driving factors
- Analyzing internal and external environments
  - SWOT analysis
  - Industry attractiveness
  - Competitive profile
- The Five Ps of Marketing (Product, Price, Placement, Promotion, People)
- Porter's Five Forces
  - Threat of new competitors
  - Substitute products/services
  - Intensity of competitive rivalry
  - Bargaining power of customers
  - Suppliers
- BCG Growth Share Matrix
  - New competitive strategy paradigm based on the "Survival Triplet"
- Black swan: what you don't know
- Benchmarking
- Strategy formulation
- Market niches
- Critical success factors
- Strategy implementation



- Budgeting and forecasting
- Translating into KPIs (Key Performance Indicators)
- Connecting the strategic plan to operations
  - The balanced scorecard
  - Potential operations, customer and financial metrics
- Feedback: budget to forecast and back
  - Excel models and alternatives
- Predicting the future
  - Revenue forecasting
  - Quantitative techniques
  - Cost projections
- Where forecasts go wrong
- Strategic risk management
  - Risk factors and identification
  - COSO-ERM Process

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**Bottom Prerequisite:**

None.

**Preparation:**

No advance preparation required.

**Level of Knowledge:**

Overview.



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**Links:**

[1] [https://www.cpeonline.com/JavaScript:showObjectivesPopup\(\);](https://www.cpeonline.com/JavaScript:showObjectivesPopup();)