

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

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Self Study Webcast  
Dec 20 - Dec 21

## 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

1. Recognize the underlying question and characteristics of strategic planning

2. Recognize the starting point for formulating a strategic plan

3. Identify the characteristics of a vision statement and a value statement

4. Identify the guiding influences of strategic planning

5. Recognize the primary goal of a SWOT analysis

6. Recognize the different categories of strategic policy in SWOT analysis

7. Identify the potential applicability of a SWOT analysis to the new and existing markets

8. Recognize the types of forces that affect what is driving an industry's competitive profile

9. Recognize the role of marketing

10. Recognize the categories of strategy development and the Porter's Five Forces

11. Identify the characteristics and patterns associated with the S-C growth strategy matrix

12. Identify the components of integrated management of value in a business ecosystem

13. Identify common characteristics and factors within a business ecosystem

14. Recognize the characteristics of a Black Swan event

15. Recognize the characteristics of innovation

16. Identify common operational and market value used to form an innovation strategy

17. Identify common financial forecasting patterns

18. Identify three guiding questions that form the foundation of the strategic plan

19. Recognize the common components of a strategic plan

20. Identify strategic business objectives to form a plan

21. Identify essential strategies for developing a viable plan



1. Recognize the importance of personal effectiveness during

2. Recognize the importance of education in a fast-changing world

3. Recognize the impact of social, economic, and technological change

4. Recognize the importance of strategic planning and budgeting

5. Identify the importance of monitoring progress to meet the National Standard

6. Identify quality control and quality assurance in strategic planning

7. Recognize the importance of strategic planning and budgeting

8. Recognize the importance of strategic planning and budgeting

9. Identify quality control and quality assurance in strategic planning

10. Recognize the importance of strategic planning and budgeting

## BottomPrerequisite:

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();)