

# 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 publicly stated SWOT analysis

7. Identify the potential applicability of a SWOT analysis to the real-world situation

8. Recognize the types of factors associated with analyzing 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 problems associated with the BCG growth share matrix

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

13. Identify common characteristics and factors which a firm strategy plan encompasses

14. Recognize the characteristics of a Block Business Unit

15. Recognize the characteristics of a business unit

16. Identify common operational and financial data used to form an operating plan

17. Identify common financial forecasting methods

18. Identify three guiding questions to assist the formation of the strategic plan

19. Recognize the common components of a strategic plan

20. Identify strategic business objectives to assist in goal setting

21. Identify commonly strategies for developing a value chain



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1. Analyze the characteristics of your organization's strategy.

2. Analyze the characteristics of solutions to a real business problem.

3. Analyze the impact of public, financial, and/or strategic plan.

4. Analyze the business strategy planning and reporting.

5. Analyze the possibilities for modeling business model under the Business Canvas.

6. Analyze business strategy planning and reporting.

7. Analyze the business strategy planning and reporting.

8. Analyze the business strategy planning and reporting.

9. Analyze the business strategy planning and reporting.

10. Analyze the business strategy planning and reporting.

## 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();)