

SUSTAINABLE STRATEGIC PLANNING

NIA's Fall Summit 2023

Rick Sutphin, Performance Contracting Group

Ashley Luse DeBoer, Luse Contracting Group

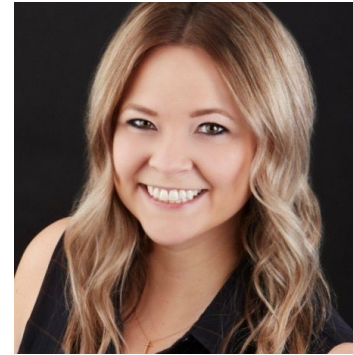
NIA | National Insulation
Association[®]

THE VOICE OF THE INSULATION INDUSTRY™

Introductions



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Agenda

- I. What Is Strategic Planning?
- II. Best Practices for Getting Started
- III. Structure & Accountability for a Sustainable Process
- IV. Aligning Strategy with Core Values
- V. Group Discussion/Q&A

What Is Strategic Planning?

What Is Strategic Planning?

- **What Is Strategy?**

- The essence of **strategy** is how firms create and capture value in light of their market environments and organizational capabilities.
- *“In many companies, leadership has degenerated into orchestrating operational improvements and making deals. But the leader’s role is broader and far more important... Its core is **strategy**: defining and communicating the company’s unique position, making trade-offs, and forging fit among activities.... Managers at lower levels lack the perspective and the confidence to maintain a strategy. There will be constant pressures to compromise, relax trade-offs, and emulate rivals. One of the leader’s jobs is to teach others in the organization about strategy—and to say no.”*

Michael E. Porter, *Harvard Business Review*

What Is Strategic Planning?

- Audience Poll

Best Practices for Getting Started

- Set Your Vision
- Create Structure/Process
- Create Accountability

Making It Stick with the Right Process



*Ashley:
What I've Learned*



THE EOS MODEL®



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: _____

VISION

CORE VALUES	1. _____ 2. _____ 3. _____ 4. _____ 5. _____	3-YEAR PICTURE™
CORE FOCUS™	Purpose/Cause/Passion: _____ Our Niche: _____	Future Date: _____ Revenue: _____ Profit: _____ Measurables: _____ What Does It Look Like? • _____ • _____ • _____ • _____ • _____ • _____ • _____
10-YEAR TARGET™	_____ _____	
MARKETING STRATEGY	Target Market/"The List": _____ Three Uniques™: 1. _____ 2. _____ 3. _____ Proven Process: _____ Guarantee: _____	

TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST																
Future date: _____ Revenue: _____ Profit: _____ Measurables: _____ Goals for the Year 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____	Future date: _____ Revenue: _____ Profit: _____ Measurables: _____ <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">Rocks for the Quarter</th> <th style="width: 20%;">Who</th> </tr> </thead> <tbody> <tr><td>1. _____</td><td>_____</td></tr> <tr><td>2. _____</td><td>_____</td></tr> <tr><td>3. _____</td><td>_____</td></tr> <tr><td>4. _____</td><td>_____</td></tr> <tr><td>5. _____</td><td>_____</td></tr> <tr><td>6. _____</td><td>_____</td></tr> <tr><td>7. _____</td><td>_____</td></tr> </tbody> </table>	Rocks for the Quarter	Who	1. _____	_____	2. _____	_____	3. _____	_____	4. _____	_____	5. _____	_____	6. _____	_____	7. _____	_____	1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 6. _____ 7. _____ 8. _____ 9. _____ 10. _____ Prioritize • Identify • Discuss • Solve
Rocks for the Quarter	Who																	
1. _____	_____																	
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Aligning Strategic Plan with Core Values

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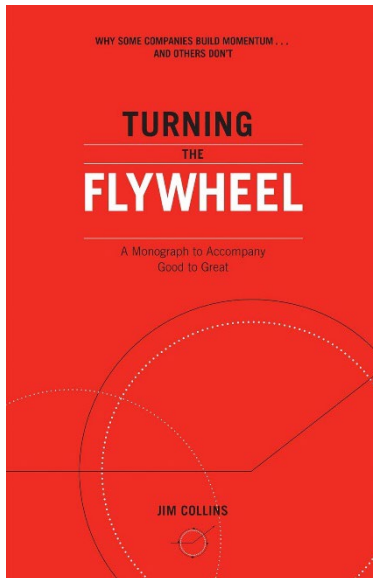
**CULTURE EATS
STRATEGY
FOR BREAKFAST**

PETER DRUCKER

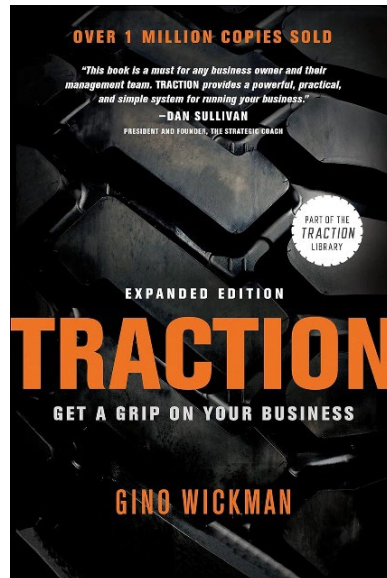
Discussion/Audience Input

Recommended Resources

Rick's Recommendation:



Ashley's Recommendation:



Other Tactical Resources:

- [EOS Model](#)
- EOS Vision/Traction Organizer (V/TO)
- YPAC Mentorship!

Thank You!

