Strategic Excellence System℠
System Overview

October 28, 2014

Today's Presentation

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Challenges in Strategic Planning

- The Strategic Planning Process
- Strategic vs. Tactical (Objectives vs. Strategies)
- Alignment and Integration
- Collaboration
- Prioritization
- Resource Allocation
- Monitoring and Measuring
- Governance
- Reporting
- Accountability

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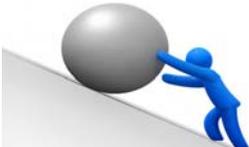
Beyond Solving the Challenges

Where do you put all of that information????

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Problem Solved

- Gather Data/Conduct Analysis
- Develop Strategic Plan
- Develop Action Plans
- Identify Resources
- Develop measures
- Track status of strategic and action plans
- Adjust as business needs require
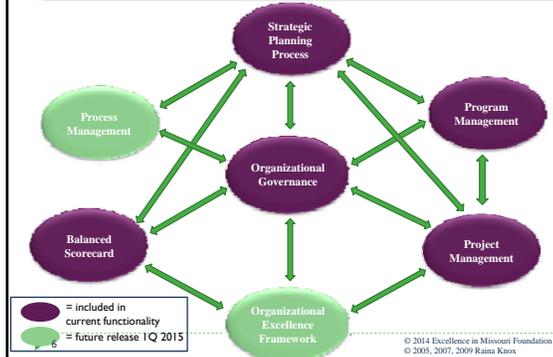- Monitor results
- Conduct governance

Single source for all strategic planning development, execution, and monitoring data providing a collaborative environment for organizational and leadership efforts.

Strategic Excellence System™

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Integrated Strategic Management System

- Strategic Planning Process
- Process Management
- Program Management
- Organizational Governance
- Balanced Scorecard
- Project Management
- Organizational Excellence Framework

= included in current functionality
= future release 1Q 2015

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SES℠ Framework

AGILE   SUSTAINABLE   RELEVANT

These are words not typically associated with strategic planning and governance of organizational performance. The Strategic Excellence System℠ features a strategic planning and organizational measurement framework that facilitates the development, planning, and monitoring of your organizational priorities across your organization. It is a fully integrated organizational process flow that supports organizational collaboration, knowledge, and governance.

The SES℠ provides an environment for collaboration, accountability, and data driven decision making; ensuring your strategic plan is always **relevant** and **sustainable**. Performance against strategic and tactical plans is sustained for the duration of your strategic planning period featuring an **agile** approach to allow for changes in the plan based on the most important business priorities.

SES℠-The History of the Application

▸ **The Framework Came First**-Developed in 2005-2007 as a part of a larger integrated system to manage strategic planning, program management, project management, and governance with a Baldrige-based approach.

▸ **Stone Age Approach**-The work was being facilitated through Excel Spreadsheets, which was not conducive to effective collaboration and document versioning.

▸ **Sustainable Strategic Planning**-Web-based application facilitates the completion of tactical action plans, resource plans, implementation plans, tactical dashboard (measures) and balanced scorecard at the organizational level (measures). It provides tools for strategic and program plan governance allowing for leadership governance.

SES℠-System Review

Strategic
Excellence
System ℠

System Work Flow

- All information is entered into a series of entry screens that support single point of entry for all information. Unlike traditional plans that depend upon numerous versions of spreadsheets, the SES℠ provides a central point of entry for all strategic planning, project planning, measurement, performance review, results information. Reports addressing all phases of the strategic planning and measurement process are generated on screen and can be downloaded into Excel for further manipulation if desired.

- Teams and individuals are able to work independently when necessary, then together in group meetings. Leaders are able to view the work at any time, generating reports to review progress.

SES℠ System Review

Reports Review

- Resource Allocation
- Action Plan
- Implementation Plan
- Resource Summary
- Strategic Balanced Scorecard
- Tactical Dashboard
- Gantt Chart
- Team Focus Report
- Leader Focus Report
- Strategy Status History
- Action Status History

SES℠ features robust reporting to support all phases of the planning, implementation, and performance review processes. Beta customers have contributed significantly to the identification of reporting needed to support organizational processes.

Additional reports and system functionality are planned for prior to and after commercial launch in 2015.

About SES℠

- The software is web based and resides in the cloud. The site is built on a leading edge platform using best practice software development processes.
- SES℠ has been in beta for about a year and will be commercially launched in 1Q2015. Participation in the final stages of beta provides substantive benefits:
  - Price protection: Beta users receive all annual software license and process information at a highly discounted rate. Price protection ensures software cost does not increase more than 10% a year, regardless of commercial price.
  - Participation in user's group working collaboratively to identify future functionality
  - Software training at a reduced price
  - Technical support is free

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Pricing

- Three Elements to Pricing
  - Software License-Annual Fee
  - Mandatory System and Plan Integration Training-Eight Hours
  - Technical Support-Free to Beta Customers
- Optional
  - Strategic Planning Consulting Available

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Wrap Up

QUESTIONS?

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