



## Understand the Operation

Assess the current state of the operation.

Review core operational information and documents.

Revisit the mission statement and core values.

**Does everything still resonate with the vision?**

## Analyze Strengths, Weaknesses, and Threats

A SWOT analysis is a tool for critically evaluating the operation.

Assess the business **strengths, weaknesses, opportunities, and threats.**

## Define Objectives and Set Goals

Drill down into specific objectives that will help achieve your vision.

**Set goals that are achievable.**

**Make your goals specific**

**Prioritize your goals.**

## Put the Plan Into Action

Objectives are future focused, so take short-term action steps.

**Structure your plan into steps and specific tasks.**

**Measure growth. Each step must be part of the whole to achieving the goal.**

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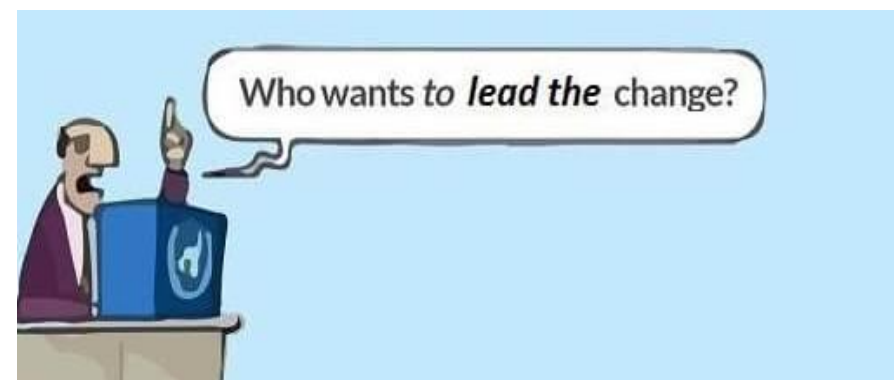
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If leaders passively support or resist change, expect the same from direct reports.





**SWOT is one of the most common tools used in the strategic planning process, but *it's not appropriate for every situation.***



## Strengths

1. What do you excel at?
2. What are your greatest accomplishments?
3. What are you most proud of?
4. What makes you unique?



## Opportunities

1. What partnerships would lead to greater success?
2. What changes and trends in the market align with your strengths?
3. What threats do you see?
4. Are there gaps in the market that you could fill?



## Aspirations

1. What do you want to achieve in the future?
2. What should your future business look like?
3. How can you make a difference?
4. What are you passionate about?



## Results

1. What measures will tell you that you are on track to achieve success?
2. How do you translate your vision of success into tangible outcomes?
3. How do you know when you've achieved your goals?





**NOISE: Needs, Opportunities, Improvements, Strengths, and Exceptions.**





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**Employees want to hear about change *from their immediate supervisor.***

- What does this change mean to me?
- What's in it for me?
- Why should I get on board?
- Why are we doing this?



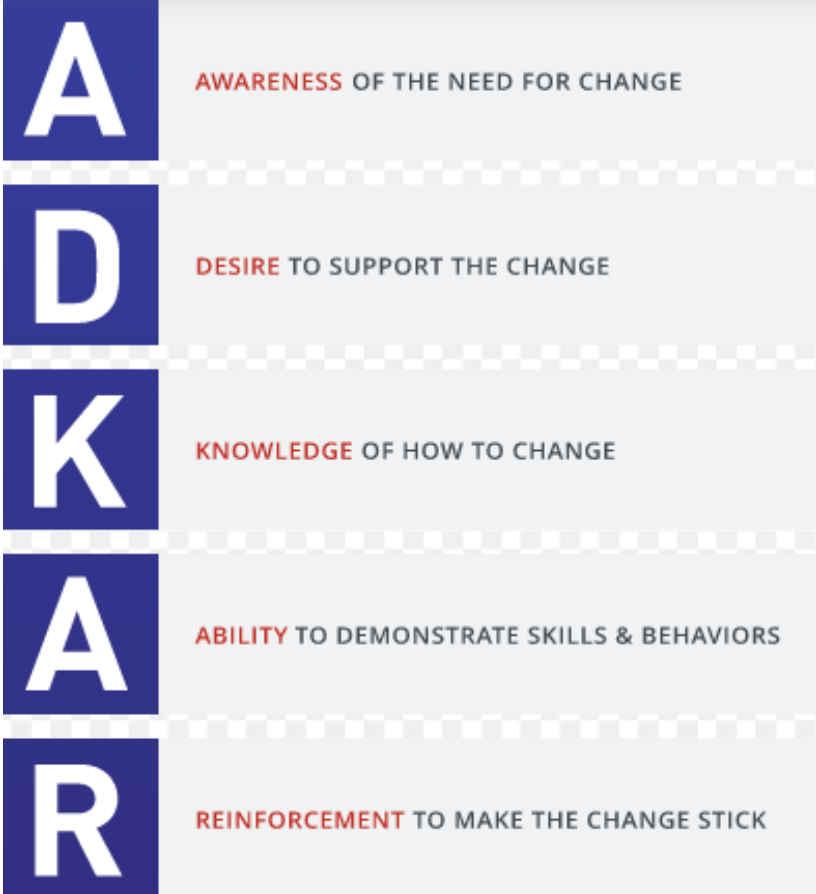
**“What if, and I know this sounds kooky,  
we communicated with the employees.”**

## Roles of Managers During Change

- **Communicator** - Communicate with direct reports about the change.
- **Advocate** - Demonstrate support for the change.
- **Coach** - Coach employees through the change process.
- **Liaison** - Engage with and provide support to the team.
- **Resistance manager** - Identify and manage resistance.



The role of coach involves supporting employees through the process of change.



Because of their relationship, supervisors can coach employees through the change process.

When projects and initiatives impact an employee's day-to-day work, a leader can help them grow self awareness and address barriers that are inhibiting successful change.

Stability and change must coexist for a successful transition to occur.



