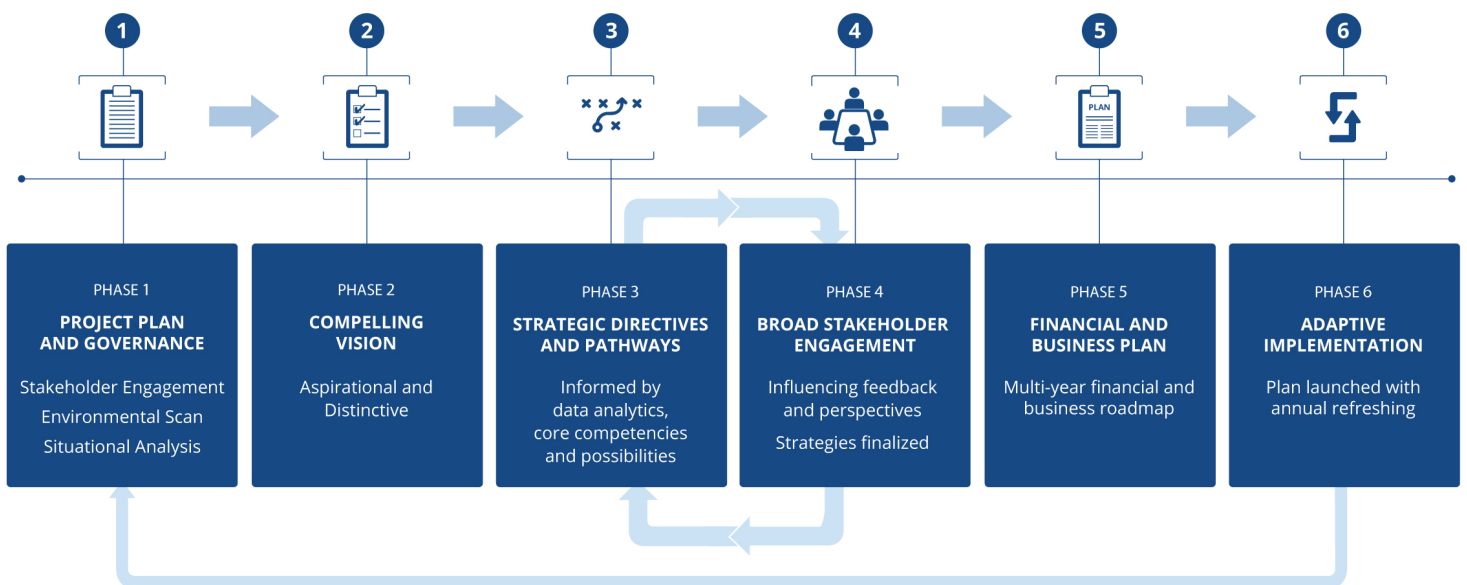


# 6-PHASE STRATEGIC PLANNING PROCESS

The Napa Group’s 6-Phase Planning model is a facilitated process that produces strategic solutions with supporting resource plans and an implementation roadmap informed by enterprise thinking and integration. As one of our core tools for facilitating organizational change, this interactive process will engage your people, explore the possibilities, shape the right strategies and develop the systems in response to changing expectations of customers and stakeholders.

Combined with our new approach to broad-based, integrated strategic communications practices, this signature process by The Napa Group aligns strategies across the organization, strengthens constituent relationships, drives differentiation and implements strategic results.



**PHASE I** Project Plan and Governance

Internal data analysis and stakeholder "listening"  
External market and competitor analysis and industry trends  
Situational analysis  
Project plan, leadership roles, communications plan

"How are we seen by our customers and partners?"  
"What's happening around us?"  
"How will we design and manage our planning project?"

**PHASE II** Compelling Vision

Vision, Mission and Values  
High-level strategic directives

"How do our leaders and stakeholders envision our future?"  
"What are our planning priorities?"

**PHASE III** Strategic Directives and Pathways

Draft strategic plan framework – goals and objectives  
Stakeholder engagement plan

"What goals and objectives, using data-driven analytics, will achieve our strategic directives?"  
"Are we asking and answering the right questions?"

**PHASE IV** Broad Stakeholder Engagement

Surveys, focus groups, town halls  
Task Forces - tactics, timelines, metrics and resources needed  
Performance goals and outcomes

"Do we have the right people at the right meetings?"  
"How will we evaluate and incorporate influencing feedback and perspectives?"

**PHASE V** Financial and Business Plan

Business plan framework  
Final Strategic Plan  
Implementation roadmap/Years 1-2 action plans  
Dashboard

"What is the 5-year forecast for revenues and expenses to achieve success?"  
"What will be different when our goals are accomplished?"

**PHASE VI** Adaptive Implementation

Strategic Plan approval  
Launch communications and rollout  
Change management strategies

"How will we assess annual progress and refresh/reforecast as situations change?"  
"What structures, performance systems and communications will facilitate and bring visibility to the plan's outcomes?"