



CERTIFIED STRATEGIC PLANNER

CHECKLIST

Company:

Strategic Planning Process Owner:

CEO/President:

Task	Completion Date	Comments /Notes	Sign-off/ Complete
Situation Analysis (Internal and External)			
Pre-reading Articles: Approach to Strategic Planning – Aileron Theory of Business Michael Porter’s Big Ideas The Real Value of Strategic Planning Strategy Toolkit – Mind Tools (will use through-out) Simplified Strategic Planning – book (will use through-out)			
<i>Complete Strategic Planning Audit</i>			
<i>Complete Strategic Planning Process flowchart</i>			
Certification of Strategic Survey tool (planning team, employees)			
Certification of Customer Survey tool			
Certification of Business Segmentation tool			
Certification of Market Segment Analysis			
Certification on (PEST) Industry 7 factors (of 5 Forces) tool			
Certification on Competitor Analysis tool			
Certification of SWOT tool			
Plan Development (Strategic Plan)			
Pre-reading Book from above			



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Mind Tools from above One page strategic plan: How to complete What is Strategy Customer Value Propositions in Business Markets			
<i>Complete Core Competencies (optional)</i>			
Certification of Ansoff Matrix tool			
Certification of GE-McKinsey Matrix			
Certification of Strategic Summary Tool			
Certification CSF/Priority Planning Tool			
Implementation			
Pre-reading Why Strategies Fail Mastering the Management System 5 Dysfunctions of a team			
<i>Complete 3-5 year Strategic Budget</i>			
<i>Complete Leadership/Strategic Team Charter</i>			
Certification Meeting Calendar Matrix			
Strategic Management (not part of certification, but recommended to complete in 1st 12 months)			
<i>Complete Company strategic planning master/central place for information</i>			
<i>Train Organization on Company Strategic Planning Process</i>			
<i>Document Strategic Plan is Linked to Departments/Teams and Key Individuals</i>			
<i>Prepare/Facilitate Quarterly Assessment</i>			
<i>Prepare and Hold Annual Update</i>			