Building Your Continuing Education & Customized Training Strategic Plan

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Today’s Presenter: Greg Marsello

- Co-founder of LERN
- Road Warrior
- Industry Models
- Lumens Product Development & Liaison
Agenda

- Two Plans & Your Foundation
- Strategic Plan Model
- Role of Software System
- Strategic Plan Example
- Next Steps
- Questions & Answers
Two Plans

One Year Business Plan

Strategic Plan
Your Foundation

USP

Vision

Values

Mission
Strategic Plan

- 2-5 years
- Updated yearly
- Who you are
- Benchmarks
- Initiatives
- Guides OYBP
Strategic Planning Components

Organization Narrative

- A high-level description of your organization. History. What you do? Important components of who you are
Strategic Planning Components

Mission Statement

- Why you exist
Strategic Planning Components

Value Statements

- Customer, staff, and business statements
Strategic Planning Components

Unique Selling Proposition

- The characteristics of your organization causing new people/clients to participate and past participants/clients to repeat
Strategic Planning Components

Environmental Scanning

- What is going on in your “community”/the territory you serve?
Strategic Planning Components

SWOT Analysis

- What are your strengths, weaknesses, opportunities, and threats?
Strategic Planning Components

Key Data

- Finances
  - Your financial performance the last three years

- Benchmarks
  - The benchmarks you track and your performance the last three years

- Market Segments
  - Your seven primary market segments
Strategic Planning Components

Competition

- Analysis of your top 3-5 competitors
Strategic Planning Components

Major Initiatives

- What major initiatives (will generate $100,000+ by year 3) are you working on?

NOTE: LERN’s 8-Step Needs Assessment Model is designed to help with this process.
Strategic Planning Components

Areas to Address

- Finances/Budgeting
- Needs Assessment
- Program Development
- Pricing
- Marketing/Promotion
- Operations
- Customer Support
- Staffing/Staff Development
- Communication Systems
- Evaluation
  - What actions need to be taken in each of the areas (and other appropriate areas) to improve performance?
Strategic Planning Components

Strategic Plan Actions

- The long range action steps you will be taking
Strategic Planning Components

Strategic Plan Timeline

- The long range action step timeline you will be following
Role of Software

- Data collection, analysis & reporting
- Increasing staff productivity
- Branding
Next Steps

1. Use a One-Year Business Plan
2. Collect critical data
3. Determine narrative, mission, values statements, USP, environmental scanning, SWOT, key data and competition
4. Use LERN 8-Step Needs Assessment Model for new initiatives
5. Use retreat to review above and focus on areas to address, actions and timeline
6. Update yearly
Questions
Thank You!

Lean on LERN for “Information That Works!”

info@lern.org
marcello@lern.org

Go to www.lern.org to purchase LERN Strategic Plan Publication

To request a complete in-depth demo of Lumens, contact sales@agusoft.net or go to augusoft.net to submit a request.