



# ***Strategic Visioning Workshop Overview***

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**March, 1997**

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# Strategic Visioning

**Part 1: Assess your strategic direction given industry experiences and a your:**

- Resources
- Capabilities and
- Constraints.

**Part 2: Build consensus and motivation with your senior management team to insure your future success.**

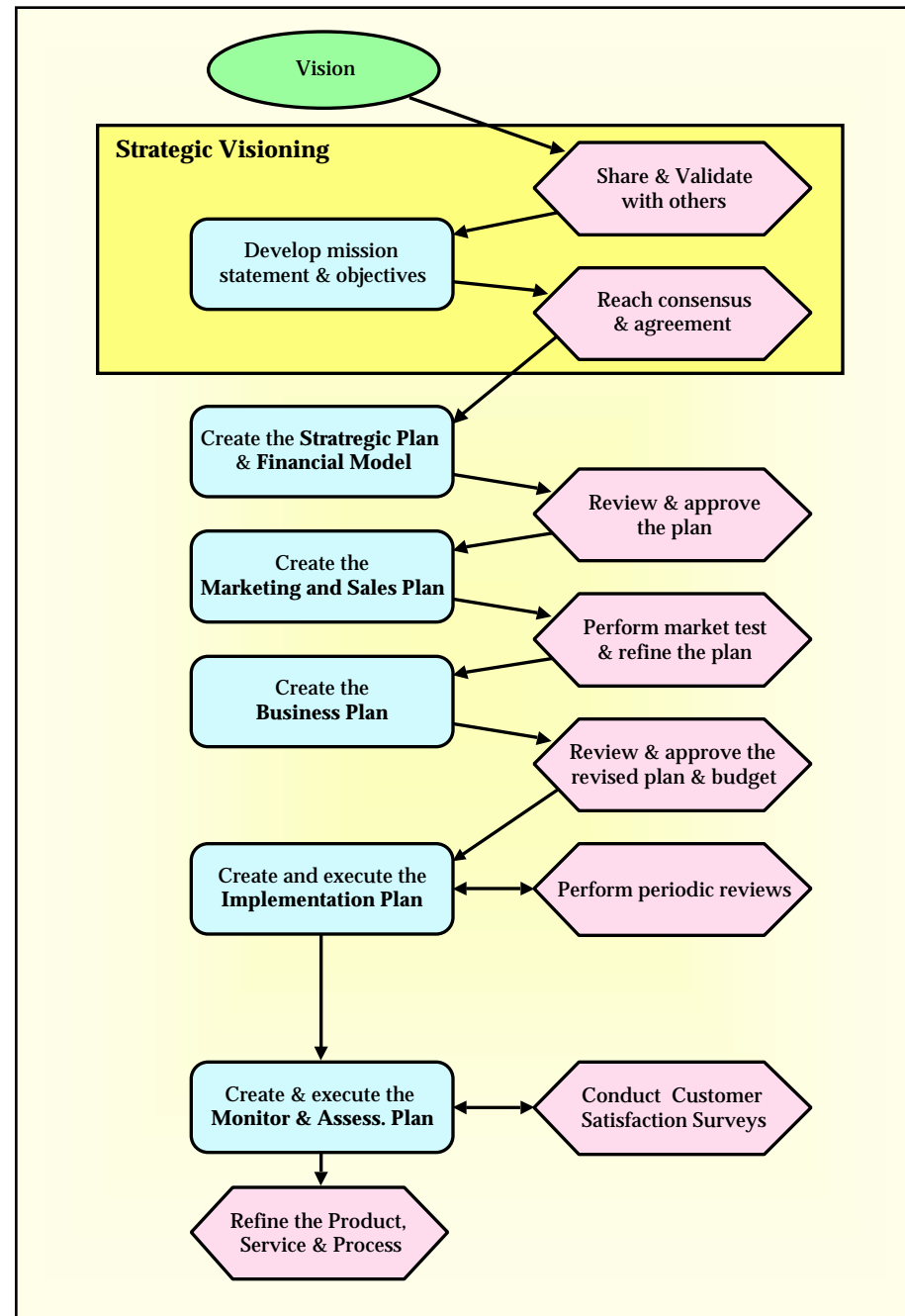
# Strategic Visioning Objectives

- Review your existing vision, mission and objectives
- Organize your vision and ideas to maximize their benefit to your business
- Clarify and prioritize your vision and ideas based on their benefit your business
- Review your organization, resources and constraints
- Build consensus and motivation for your updated mission statement and objectives
- Develop basis to review and update your strategic plan

# Strategic Visioning Benefits

- Improves your focus and priorities
- Identifies major new business opportunities
- Identifies opportunities for business, products, services and organizational improvements
- Identifies opportunities for change
- Builds consensus within your organization
- Provides context for your business decisions
- Improves internal and external communications
- Provides industry perspective and measurements for your senior management.

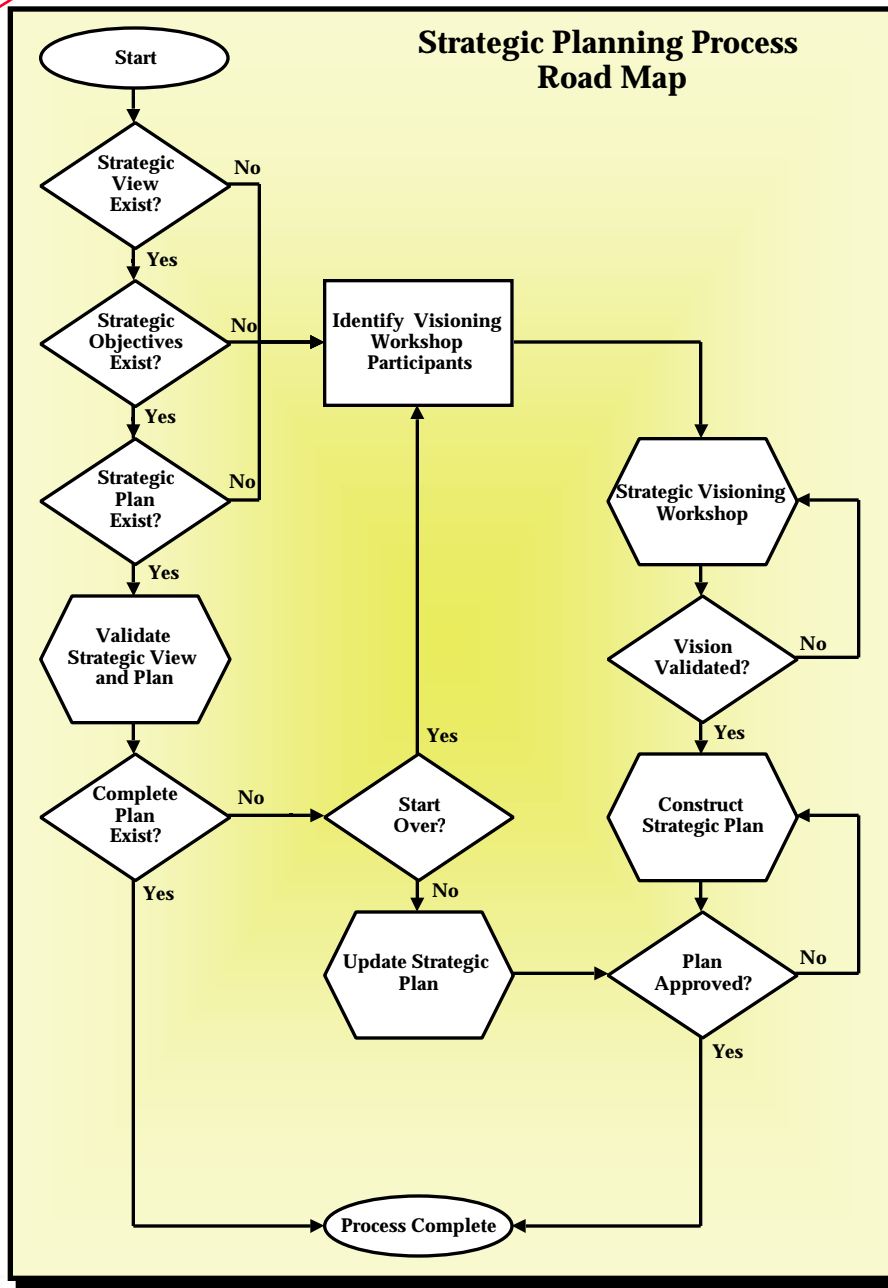
# Where does Strategic Visioning fit within the business process?



# Do you need Strategic Visioning?

A Strategic Vision and a Strategic Plan are key to your company's success.

The Workshop ensures that your strategic vision and plan incorporates all the appropriate sales, service and distribution channels, including your Call Center(s) and web sites.



# What is a Strategic Visioning Workshop?

# **Strategic Visioning vs Channel Assessment**

## **Visioning/Strategic Planning**

- **Explore your business opportunities and potentials**
- **Identify and validate your business direction**
- **Differentiate between strategic and tactical**
- **Build consensus within your senior management team**

## **(Sales & Marketing) Channel Assessment**

- **In-depth Channel snap shot study**
- **Where do your Channels fit within your business processes?**
- **How well are your Channels functioning?**
- **Are your Channels meeting their objectives?**
- **What could be done better?**



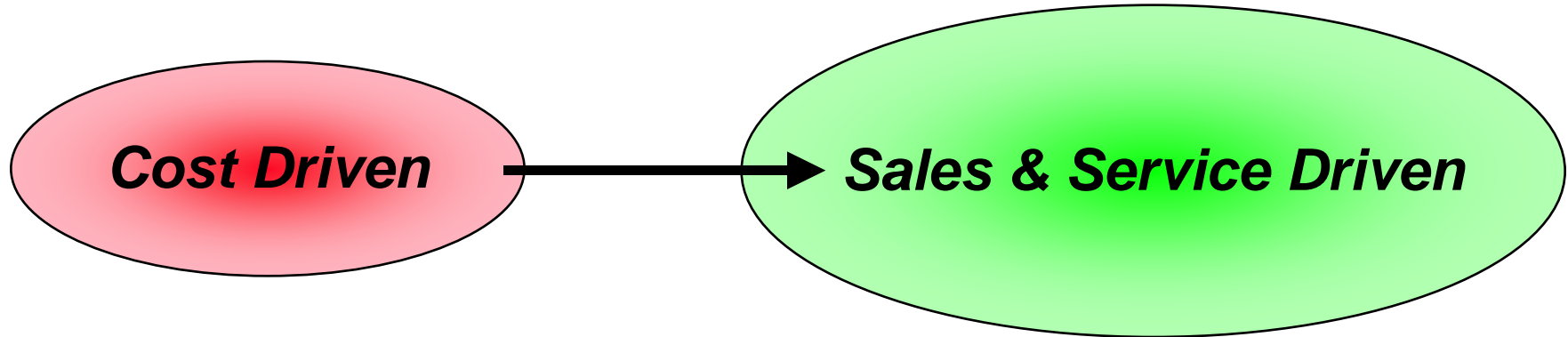
# Strategic versus Tactical

# Strategic Focus

## Focus on:

- Customer
- Industry/Market
- Market Share
- Profit

# Strategic: Positioning for Tomorrow



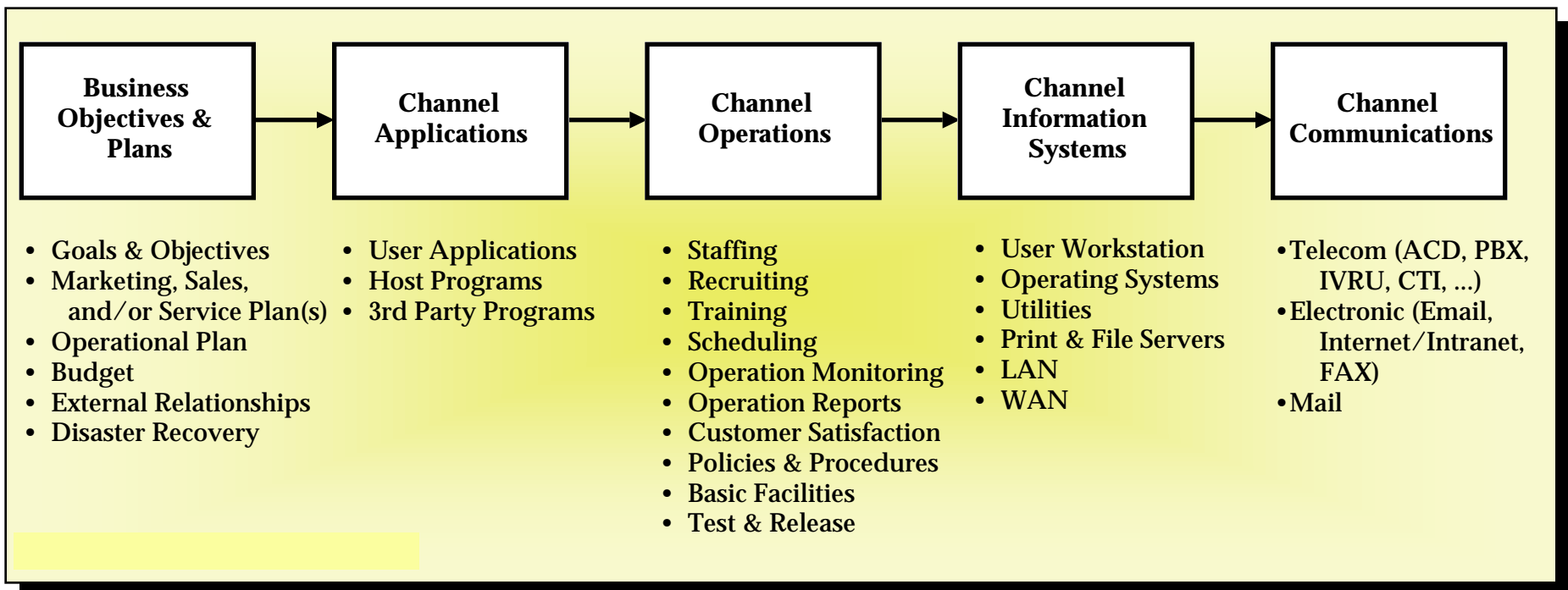
## Minimize costs:

- Limit your Channel resources
- Limit your talk time
- Handle your customers more efficiently
- Manage your call volume to your available staff
- Reduce your live call handling through more automation (e.g., automated voice response)

## Maximize sales, customer satisfaction and market penetration:

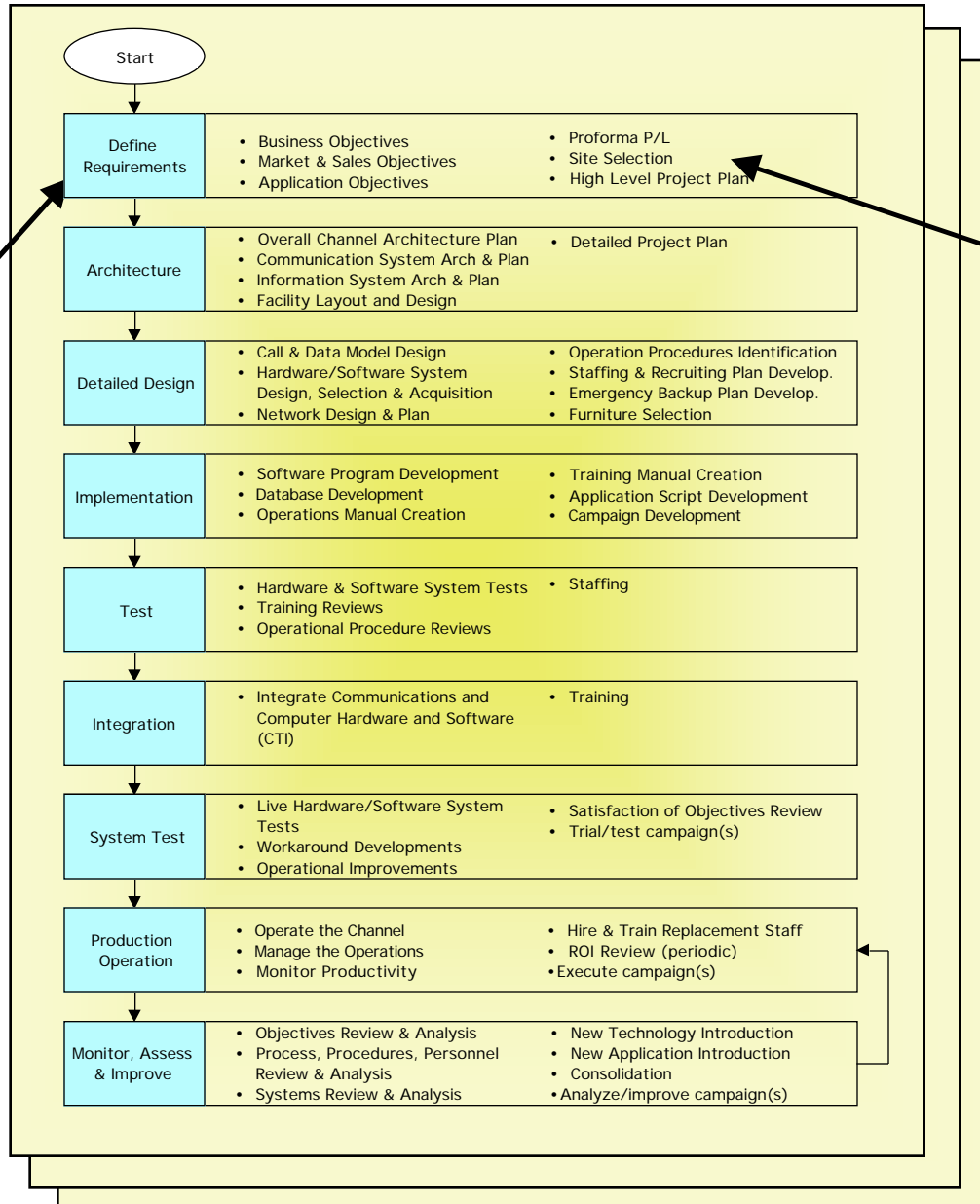
- Enrich your agent/customer relationship
- Introduce more and improved products
- Add new customers, while retaining existing customers
- Improve your sales processes
- Make more sales attempts

# Tactical: Today's Channel Business and Operations



# Channel Tactics

**Channel Development Steps**



**Business Development and Operations**

# Summary

- **A Strategic Vision and Plan are key to your company's overall success.**
- **A Strategic Visioning Workshop will ensure that all your key resources and constraints are incorporated into your mission and objectives**

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