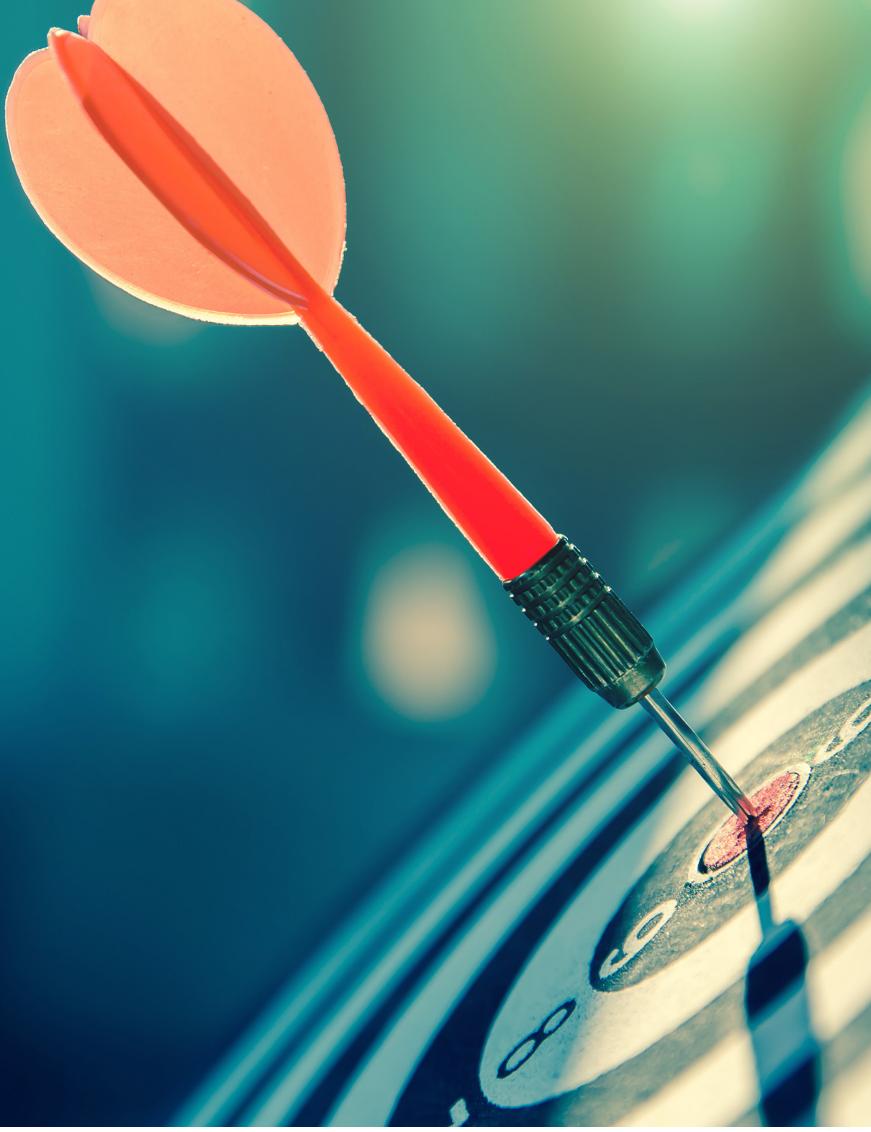


# 2022 WHITE BOOK

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## STRATEGIC PLANNING

The (proper) bases for building the general strategy of a commercial development project





# Contents

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	<b>05</b>	Introduction
<i>Chapter 1</i>		
<b>Words and their meanings</b>	<b>07</b>	Strategy
	<b>07</b>	Company
	<b>07</b>	Business strategy
	<b>07</b>	Goal
	<b>07</b>	Resource
<i>Chapter 2</i>		
<b>The stakes of strategic planning</b>	<b>09</b>	Anticipation is strategic for the success of a project
	<b>09</b>	At least three levels of strategic planning in a project
	<b>10</b>	Plan tasks and actions to inspire employees and partners
	<b>11</b>	7 key factors of work motivation
	<b>12</b>	A travel itinerary

---

# Contents

*Chapter 3*

## The 6 stages of strategic planning

- 
- 14** Designing before acting
  - 15** Confirming the business development opportunity
  - 16** Designing the strategic frame of a project
  - 17** Defining structuring strategic goals for a project
  - 18** Designing a strategic roadmap
  - 19** Identifying means and relevant performance indicators
  - 20** Defining and setting up the tactics and action plans
- 

*Chapter 4*

## FOCUS ON Business Development

- 23** Perpetuate your business
- 24** 6 benefits of strategic planning to your business
- 25** 7 key success factors in business
- 27** 9 Challenges for 21<sup>st</sup> century businesses
- 30** About ND Consultant

# Introduction

## STRATEGIC PLANNING WHO IS IT FOR? AND WHY IS IT IMPORTANT?

The principles of strategic planning do not only apply to promoters of a lucrative professional activity. These are principles that can be applied to all areas of a professional life, as long as there are specific targets and goals to achieve.

This White Paper is therefore not just for the use of entrepreneurs. It is aimed at a wider audience of people who want to achieve a particular professional goal, within a specific time frame. That being said, our company activity being business consulting and coaching, we have given it a very entrepreneurial orientation.

## STRATEGIC PLANNING FOR BUSINESS DEVELOPMENT.

According to the World Bank, in 2020, the world had 45.2 million formalized businesses, out of a working population of 2.4 billion people worldwide. But the global COVID-19 pandemic has profoundly changed the situation since this study.

Subsistence entrepreneurship, which

was already strongly present in so-called "low-income" areas, is now omnipresent under different names depending on the territory (self-employment, subsistence entrepreneurship, Freelance, etc.). In fact, this so-called "informal" operating model is difficult to trace by the authorities.

On the other hand, traces of many of these main or secondary professional activities are easily found on social networks (Meta group, Twitter, LinkedIn, Telegram, etc.). Unfortunately, few of them seem to resist the constraints of the market beyond a few months.

This White Paper is therefore mainly aimed at these enterprising people, to put them on the path to sustainability of their commercial or associative projects, by helping them build or strengthen their strategic approach to a target market.

Enjoy your reading !

Nathalie Daouda  
Founder of ND Consultant



Chapter 1  
**Words  
and their  
meanings**

Strategy	07
Company	07
Business strategy	07
Goal	07
Resource	07

# Words and their meanings

## STRATEGY



The art of planning and coordinating a set of tasks with the intention of reaching one specific goal.

## COMPANY



A legally autonomous economic entity that produces goods or services, with commercial purpose.

## BUSINESS STRATEGY



The art of planning and coordinating the tasks of an economic entity that produces goods or services, with the intention of reaching a commercial purpose.

## GOAL



Purpose, result towards which aims the actions of a person or a group.

## RESOURCE



Which allows to do something.

*Chapter 2*

# The stakes of strategic planning



THINK  
BEFORE  
YOU  
SPEAK.  
**READ**  
BEFORE  
YOU  
THINK.

Anticipation is strategic for the success  
of a project 09

At least three levels of strategic  
planning in a project 09

Plan tasks and actions to inspire  
employees and partners 10

7 key factors of work motivation 11

A travel itinerary 12



Photo de Brendan Church (Unsplash)

According to a French National Institute of Statistics and Economic Studies study, (INSEE) conducted in 2016, 98% of small businesses do not survive the first three years of their existence, due to:

- ① Loneliness of entrepreneurs,
- ② Lack of investment,
- ③ Lack of certain skills,
- ④ Lack of innovation.

Today in the post-Covid19 socio-economic context we know, there are more business creations than before 2019. But the solidity of these structures has not improved.

Young companies painfully live past the first twelve months of their existence, formal or not.

## ANTICIPATION IS STRATEGIC FOR THE SURVIVAL OF A PROFESSIONAL PROJECT AS MUCH AS FOR A COMPANY.

Strategic planning makes it possible to anticipate the

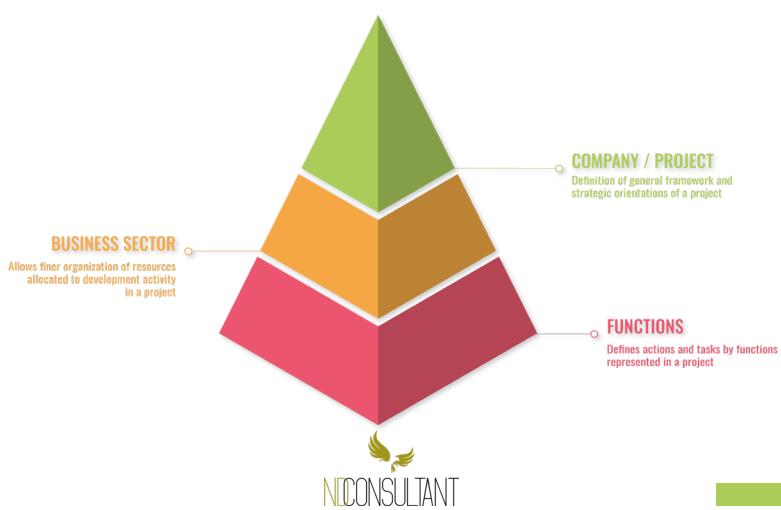
important orientations of a project, regardless of its nature. This discipline makes it possible to determine the various resources and their volume to be mobilized for a successful venture. We are talking about resources such as:

- ① Human,
- ② Materials
- ③ Financial
- ④ Technological
- ⑤ Information / data

## IN A COMPANY, THERE ARE AT LEAST THREE LEVELS OF STRATEGIC PLANNING APPROACHES.

To be effective, strategic planning must occur on various levels of the organization, and different temporal terms.

## 3 LEVELS OF STRATEGIC PLANNING



# Together, We Create!

Photo "My Life Through A Lens" (Unsplash)

## PLAN TASKS AND ACTIONS FOR TEAM MEMBERS AND PARTNERS TO MAKE SENSE OF THINGS IN A PROJECT.

When you know where you are heading, it is easier to fully commit to each stage of the project. Because the success of any project depends mainly on a proper execution of the various tasks. The less involved and diligent the associates are, the greater the risk of failure.

Motivation of the team members depends on their understanding and adoption of the overall objectives of the project.

by the obviously arduous work several men are doing, he approaches them and asks the first of one of the stonemasons:

"What are you doing?" The latter replies without enthusiasm, that he is cutting a stone.

Unsatisfied with the answer, the man approaches a second, similarly busy man and asks the same question. This time the worker takes the time to explain that he is cutting a stone to build a wall.

Still curious, the man approaches a third worker with the same question. The worker replies with pride: "I am building a cathedral!" .

**What to remember from this allegory, applicable to strategic planning, is:**

**1** The 1<sup>st</sup> worker is focused on his task and finds no source of satisfaction in it.

**2** The 2<sup>nd</sup> worker is more involved in his task because he understands that his work is part of a larger action.

**3** The 3<sup>rd</sup> worker, on the other hand, knows, understands, and adheres to the global vision of the project. He is totally committed.

Photo dhanu3182 "Notre Dame de Paris" (Adobe Stock)

## ALLEGORY OF THE THREE STONEMASONS

A man arrives in 13th century city of Paris. Intrigued

# 7 key factors of work motivation

1



Seeing the fruits of our labor may make us more productive

2



The less appreciated we feel our work is, the more money we want to do it

3



The harder a project is, the prouder we feel about our contribution

4



Knowing that our work helps others may increase our unconscious motivation

5



The promise of helping others makes us more likely to follow rules

6



Positive reinforcement about our abilities may increase performance

7



Images that trigger positive emotions may actually help us focus

Source <https://ideas.ted.com> – Jessica Gross (publication initiale sur le Blog TED en avril 2013)

# A travel itinerary

Possessing a strategic plan is probably the most important management tool for a company. It could be compared to a travel plan.

Though, a business strategic plan cannot go without a clear goal. Knowing where you intend to go helps determining the path to follow. Therefore, strategic planning is a question of :

**① Anticipating** the important stages of your “journey”

**② Gathering** forecasting the human, physical and financial resources required to implement the plan in the best possible conditions

**③ Managing** the available resources

**④ Managing** your time

*« Strategy without tactics is the slowest road to victory. Tactics without strategy is the noise before defeat. »*

Sun Tzu.





### *Chapter 3*

# The 6 stages of strategic planning

- |   |    |
|---|----|
| Designing before acting                               | 14 |
| Confirming the business development opportunity       | 15 |
| Designing the strategic frame of a project            | 16 |
| Defining structuring strategic goals for a project    | 17 |
| Designing a strategic roadmap                         | 18 |
| Identifying means and relevant performance indicators | 18 |
| Defining and setting up the tactics and action plans  | 19 |



# Design before acting

There are several schools when it comes to strategic planning. But whatever the approach, the process boils down to 6 essential steps:

The first three steps constitute the design phase. It is the cornerstone of the entire project development program

**① Confirming** the business development opportunity.

**② Determining** the strategic framework of the project by formalizing a goal (or vision) to be achieved.

**③ Setting** structuring strategic objectives.

The last three steps constitute the implementation phase. At that stage, the theories are being confronted to field reality.

**④ Defining** the strategic roadmap for project development.

**⑤ Identifying** available resources and relevant performance indicators. Monitoring the implementation of the strategic plan.

**⑥ Implementing** tactics and action plans for development.

# 1 Confirming the business development opportunity

This involves an observation and information gathering phase about the identified opportunity. Following steps is to conduct a serious market study to answer these questions:

- ❶ What are the major trends in the market context? What are the customs, technologies, general behaviors of the stakeholders and beneficiaries of the solutions? What are the trends in legislation etc...
- ❷ Who are the buyers and the users (or consumers) in this sector? Distinguishing between those who give the order to act and those who are operational. In sales for instance, it will be necessary to distinguish between buyers and consumers. Identifying and trying to fully understand their motivations for choosing a particular solution. What is their available budget? What are the expectations, constraints, etc...
- ❸ What alternatives are available? Are these

alternatives really suited to market needs? What are the characteristics? What are the availabilities?

- ❹ Identifying industry sector data. What does the law say? What economic, social, technological, ecological, and legal factors are influencing the sector?
- ❺ Who are the industry suppliers? What is their bargaining power? What alternatives for restocking are available...?
- ❻ Identifying the real strengths and weaknesses available to act on the targeted opportunity.
- ❼ The conclusion of the market study is a SWOT analysis, to summarize the strengths, weaknesses, opportunities and threats of the project.

# 2

## Designing the strategic frame of a project.

An image to symbolize strategy in company could be that of a train. It is not necessary to be an engineer, we understand that the traction functions are in the locomotive, and not in the wagons. But without the wagons, the locomotive is just a brute force.

It is the combination of tractive force and carrying capacity that makes the locomotive/wagons combination relevant. The same goes for strategy of a company or a development project.

The vision acts as a locomotive. It is what gives meaning and enables the different available resources to be activated accordingly.

As the Pirelli brand so aptly put it, "Without control, power is nothing".

Having a strong vision and unorganized resources lead to nothing concrete. Vision alone is not enough to transform an opportunity.

The vision is often close to a dream. This is not a problem at this stage of building a project's strategic plan though.

What will make the difference between a utopia and

a real business vision is the potential for sustainable financial gain linked to this vision. The vision must therefore be concrete, achievable, motivating for all the stakeholders, and above all it must be defined over time.

Achieving a vision involves accomplishing several tasks before you can claim to have achieved it.

These different actions and tasks are to be grouped by consistency, so as not to forget or neglect anything important. The dominant theme of each group becomes an objective on its own.

Example: [New Vision of The Coca Cola Company "A world without waste"](#)

In the above example with Coca Cola, all the actions and decisions of the company's leaders will be taken considering the new responsible and ecological vision. The choice of strategic positioning will impact production, supply and distribution procedures, customer relations, waste management, communication, etc

Photo de Brooke Lark (Unsplash)

# 3

## Defining structuring strategic goals for a project

Identifying what will allow us to confirm that the Goal has been achieved. Each element must be measurable according to objective criteria. As part of a business development project, it could be ① volume of sales, ② sales revenue, ③ size of portfolio, ④ number of contracts won, ⑤ number of high-performing employees etc.

To ensure a complete and optimum follow-up, it is recommended to choose three to five goals.

In the example above, goals ① and ② can be grouped to form a single "Sales Performance" objective. Goals ③ and ④ can form "Portfolio development" objective.

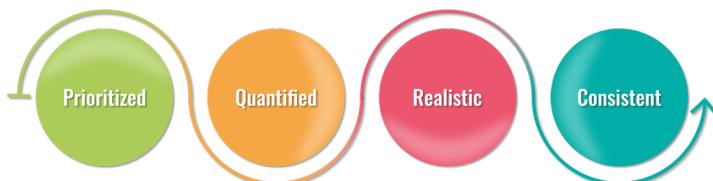
When goals are defined, they should be rendered "digestible" or S.M.A.R.T. It is basically a commonsense approach to make the objectives understandable by all, and attainable.

If the goals are too ambitious and poorly framed, we run out of ourselves running after chimeras, with the strong risk of abandoning if we are alone, or demotivation of the team members. This how leaders end up managing demotivation, various conflicts, absenteeism, underperformance, etc.

The structuring goals can be organized by importance or according to a logical order of implementation.

In the small example above, we would go first with ① **DEVELOPING THE PORTFOLIO**, then ② **COMMERCIAL PERFORMANCE**.

It is very important that the structuring objectives are complementary to avoid misused energy moving forward on non-convergent subjects.



**SMART** : S (specific) M (measurable) A (Achievable) R (Realistic) T (Time Bounded)

# 4

## Designing a strategic roadmap for a project

When the structuring strategic objectives are fixed and satisfactory for you, reflection and preparation can be initiated before acting.

The precise analysis of each structuring strategic goal makes it possible to identify what it is made up of. As the manager of a development project, a good way to involve employees is to organize brainstorming sessions. Because it is both a stimulating approach for creativity and a tremendous way to commit all the stakeholders in the project. When we work alone, a brainstorming session respects the same rules as a reflection in a group: take a paper, a pencil, and write down everything that comes to mind. Simplicity is by far the best way to see innovative ideas emerge.

Then, if there are things that have been proposed several times, simply eliminate the duplicates. Coherent proposals must be grouped to form thematic sub-groups that will serve as basis for developing the various operational strategies.

Breaking down a structuring strategic goal makes it more “digestible” and concrete. Hence, it is easier to communicate with the teams. This is also the time to

precisely and efficiently define roles and responsibilities of the people involved in the project.

Thanks to this work, it is easier to understand what energies and resources must be mobilized, with whom and how we must work.

The approach of managing your business by objectives (MBO) is a very rigorous way of managing time, resources, and performance.

# 5

## Identifying means and relevant performance indicators.

Monitoring the implementation of the strategic plan is probably the most difficult part of strategic planning. And it is probably the reason for most entrepreneurs or young business developers' failure in the early stages of their venture.

This is undoubtedly one of the most tedious parts of strategic planning because all the assumptions will be challenged on the field.

To give an image, it's like the moment when a

*(5%) conversion rate  
Costs : \$42,000  
= \$843 / buyer*

(89%)

*Audience Size 10000  
Response Rate → 10%  
(expect, now?)  
Conversion Rate → 5.3%  
average buyer purchase → \$18,000*

mountaineer checks all his equipment, his physical condition, the weather, before starting the ascent.

It is mandatory to review everything:

- ① Internal resources (material, financial, knowledge, skills, patents, inventions, know-how, local)
- ② External resources (material, financial, known human resources, technology, etc.)
- ③ The necessary but unavailable resources (their accessibility, scarcity, price, etc.)
- ④ Internal constraints (material, time, physical, family, etc.)
- ⑤ External constraints (material, legal, environmental, social, family, technological, etc.)

You must identify everything and know when, and under what conditions, these resources will be needed.

Then, specific indicators are to be determined, which will make it possible to monitor their proper use. One best tool to do this is a dashboard.

There are several types of dashboards, with various technologies and presentations. But the principle is that the tool brings together all the goals and performance indicators. It allows to know immediately, which parameters should be monitored or corrected if necessary.

## The principle

Each structuring goal mobilizes a certain number of resources. And each resource represents a value. It is the sum of the resources that makes it possible to manufacture the final value of the solution or the deliverable.

Hence knowing the purpose (or the role) that must play each resource is important. It helps optimizing performance.

# 6

## Defining and setting up the tactics and action plans.

Now is the time to act. All basic information is available. A team and resources are mobilized.

**Demonstrating agility and mobilizing the right level of energy are pillars for transforming an opportunity.**

« *No battle plan survives contact with the enemy* » (Helmut Karl Bernhard).



We must consider the actual environment of the project because it is necessary to integrate parameters as random as weather, news, traffic, etc. Their impact must be anticipated as much as possible.

People and companies to be associated with the plan must also be managed. This is the prerogative and responsibility of the project development manager. It is this same manager who is the source and the driving force of the motivation of all the human resources of the project.

The resources identified at a given time could no longer be available when the project starts. Technology may have evolved. The very principle of adaptability becomes one of the key success factors of a development project, despite planning.

An agile project manager knows how to adapt and find alternative solutions at least equivalent to those set out in the initial plan. And the more precise the plan, the easier it is to have to adjust along the way.

Despite the hazards during implementation of the plan, each action must always fit into a specific framework, to remain relevant.

Following the schedule and adapting it to external "real constraints", because not all the constraints are real... It would be too simple otherwise! Many constraints turn out to be circumstantial, or because of individual resistance, etc. Transparent communication generally overcomes these "false beards" quite easily.

And then, of course, there is the budget. A well-planned project also requires just as precise financial monitoring.

# The 6 stages of strategic planning

Conception Phase

Implementation Phase

1



Confirming the business development opportunity

2



Designing the strategic frame of a project

3



Defining structuring strategic goals for a project

4



Designing a strategic roadmap

5



Identifying means and relevant performance indicators

6



Defining and setting up the tactics and action plans

Site Internet: <http://www.nd-consultant-group.com>

*Chapter 4*

# Focus on business development



Perpetuate your business	23
6 benefits of strategic planning to your business	24
7 key success factors in business	25
9 Challenges for 21st century businesses	27
About ND Consultant	30

# Perpetuate your business

To run a sustainable business, an entrepreneur must focus on at least 5 general subjects:

- ① **Designing** a product or service that matches consumers' expectations
- ② Building a real **knowledge** and **understanding** of the market (stakeholders, institutions, legal aspects, consumers etc...)
- ③ Designing a solid **marketing** and **communication** strategy to support product or service market awareness
- ④ Designing **sales** and **distribution** strategies
- ⑤ **Administration, organization,** and company's assets management (financial, physical, human resources, legal matters, fiscal matters etc...)

To do so, you need to find business partners, or recruit employees. Choose whatever solution suits you best, but do not run your business alone. Bear in mind that 9 out of 10 businesses fail because of owners' isolation and lack of some competences.

# 6 benefits of strategic planning for businesses

1

Envision your company's future over the next 3 to 5 years

2

Define your long-term goals

3

Assess your current environment, as well as strengths, weaknesses, opportunities and threats

4

Develop strategies and tactics to address any identified problems

5

Assign timelines and responsibilities to turn your plan into reality

6

Reduce the risk of doing business based on better decisions and achieve your company's potential

Source : <https://www.bdc.ca> – Business Bank Development of Canada

# 7 facteurs clés du succès de l'entreprise

There are basic tools to have in order to sustainably run a company. Further to the strategic plan, you need to pay special attention to its implementation circumstances.

Here are 7 subjects you want to consider, throughout your business venture:

**① Strategy** : The plan devised to maintain and build competitive advantage over the competition

**② Structure**: The way the organization is structured and who reports to whom

**③ Systems** : The daily activities and procedures that staff members engage in to get the job done.

**④ Shared Values** : Called "superordinate goals" when the model was first developed, these are the core values of the company that are evidenced in the corporate culture and the general work ethic.

**⑤ Style** : The style of leadership adopted

**⑥ Staff** : The employees and their general capabilities

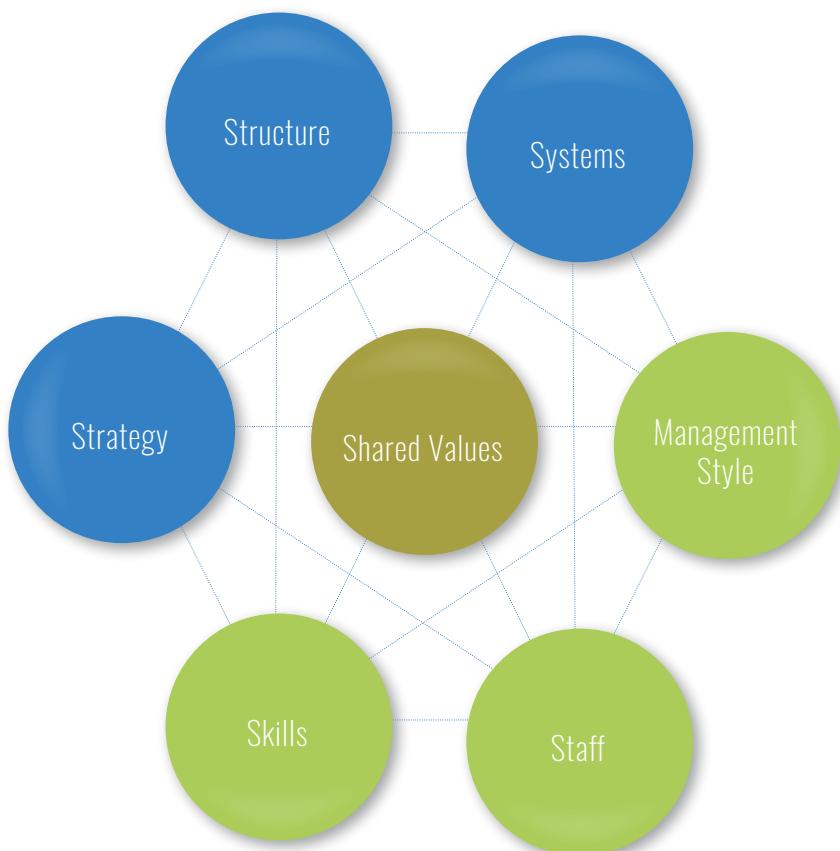
**⑦ Skills** : The actual skills and competencies of the employees working for the company

Note that Shared Values are positioned at the center of the framework. It is where all the elements converge.

Elements Strategy, Structure and Systems are called "Hard elements". That is because management teams can act on them easily.

Elements Shared Values, Style, Staff and Skills are called "Soft Elements". They are no less important. Just more difficult to apprehend and subject to cultural influences.

# McKinsey 7-s matrix



Source: [https://www.mindtools.com/pages/article/newSTR\\_91.htm](https://www.mindtools.com/pages/article/newSTR_91.htm)



## 9 CHALLENGES FOR 21<sup>ST</sup> CENTURY BUSINESSES

There are many challenges for businesses and entrepreneurs. Those could be local, specific to the industry, the micro or macro-environment.

Nevertheless, you would want to pay special attention to the 9 challenges described here. Because they are rather universal, every business owner should consider and act on them

### ① Leadership:

A holistic approach of business management is expected, due to globalization of markets, new technologies, new lifestyle international standards, ethic issues, ecology, or corporate social responsibility.

### ② Brand:

Concerns publicity, reputation of the brand and consumers' influence. Companies are expected to represent certain values according to their market, consumer targets

and the promise made.

### ③ Customer Satisfaction:

Consumers are global, connected, and informed. Customer experience with the product, service or the company is priority for most sustainable businesses. The public has access to and is in constant demand for information about the product and services they acquire.

### ④ Technology:

Communication infrastructures are global and interconnected. Science is developing fast. And thanks to possibilities offered by new technologies, business owners must constantly innovate to remain consistent with the market.

### ⑤ Security:

Both physical and digital, security is one central question from economical and geopolitical stand points. Even locally operating companies are impacted by



security issues (political, economic, digital, sanitary etc...)

#### ⑥ Data management:

This has always been a differentiation tool for business owners. Companies that are best at managing market and corporate data, have significant competitive advantage.

#### ⑦ Human resources:

An inclusive human resources management policy, helps business owners have a more accurate read of global markets.

#### ⑧ Administrative, legal, and financial organization:

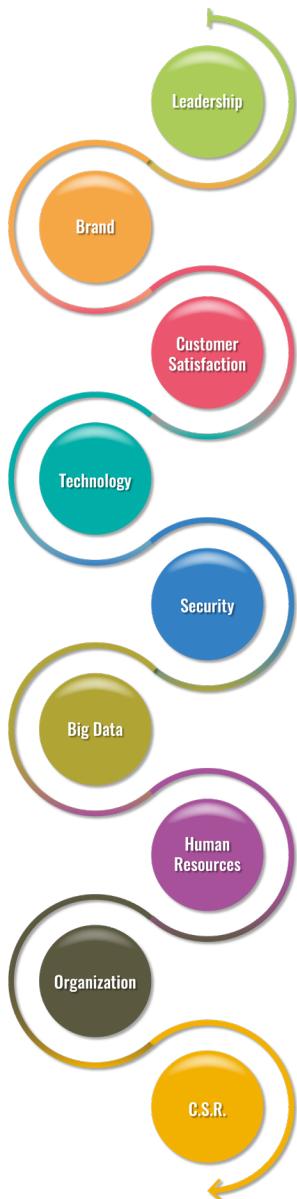
Global business organizations require adaptation to each local fiscal, commercial and social laws, and regulations.

#### ⑨ Corporate Social Responsibility (CSR):

It concerns much more than just the

ecological aspects of businesses. In a holistic, connected world, brand image is important and very fragile. Each business owner must now prove their ethical values and behaviors. They must prove their commitment to community wellbeing. Every service in a company, no matter its size, is concerned with CSR.

# 9 challenges of 21<sup>st</sup> century businesses





## CONSULTING | COACHING | TRAINING

ND Consultant offers training, consultancy, and coaching solutions, collective or tailor-made, to help its customers define and implement a strategic development plan for their economic projects.

*Together, let's convert your opportunities.*

### CONSULTING



Investigating and analyzing the human, material and financial systems of organizations, their procedures and other means implemented to produce.

### COACHING



We support professionals overwhelmed with the changes to be made within their organizations, implementing our know-how and international pool of professional experts

### TRAINING



Training designed to display practical and pragmatic tools and solutions to participants, for them to materialize their ideas and implement their projects in the field.





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