



INTRAFOCUS

# STRATEGY PLAN GENERATOR

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## USER GUIDE

### INTRAFOCUS ACADEMY

eBooks, presentations and tools to  
help demystify strategic planning



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# The Strategic Plan Generator

The strategic plan generator will help you to create a strategic plan following a tried and tested methodology. The tool provides help pages for every step and an example entry for every section and sub-section.

The following document will guide you through each of the sections and sub-sections and explain how to get the most out of the application.

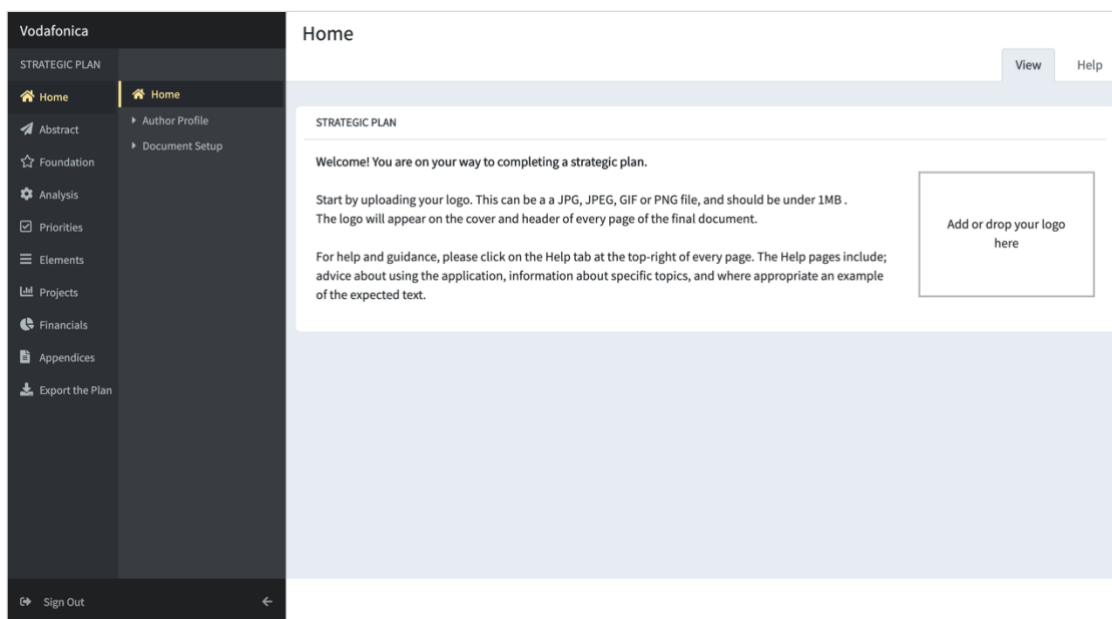
# Home

## Home Page

On entry to the application you will be presented with the home page. You can add a logo by dropping an image into the box on the right.

The main navigation for each document heading is on the left. The sub-navigation is for sub-headings related to the main sections.

**Important Note:** Look to the top-right of the page. There is a View tab and a Help tab. These appear on every page. The Help tab provides contextual help for the application and the subject. You can also find an example by clicking on Help.



## Author Profile

the Author Profile is a sub-menu. You can change your name and password in the author profile area. Your system author name will not appear in the document. The document author can be added in the document setup area.

**vodafone**

STRATEGIC PLAN

- Home
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- Priorities
- Elements
- Projects
- Financials
- Appendices
- Export the Plan

Sign Out

### Author Profile

View Help

Username (your email address)  
lukefrancis@intrafocus.com

First Name  
Luke

Last Name  
Francis

Password  
Password

Re-type your password  
Re-type your password

Cancel Save

**Important Note:** Be sure to click Save after any changes are made. The application does not automatically save your changes.

## Document Setup

These fields will appear on the front page of the exported document. All text is free form so the entries will appear exactly as entered. **Tip:** if you have added a logo, then you can leave the Organisation Name blank.

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Sign Out

### Document Setup

View Help

Organisation Name  
Vodafone

Creation Date  
June 6th 2020

Address  
1 Park Road  
Winchester  
SO22 6AA  
United Kingdom

Revision Date/Number  
V001

Author  
Luke Francis

Cancel Save

# Abstract

This section will appear at the front of the document before the Table of Contents. Although at the front, the abstract is a summary of the documents contents and is usually written last.

## Editing Tools

The input box has some editing tools. It is important to note the purpose of this tool is to guide you through the process of writing strategic content, not to create a beautiful document. We anticipate that you will either cut and paste the exported document into 'branded' company template or add branding to the final document.

The screenshot shows the 'Abstract' editor interface for Vodafone. On the left is a dark sidebar with a 'STRATEGIC PLAN' header and a list of navigation items: Home, Abstract (selected), Foundation, Analysis, Priorities, Elements, Projects, Financials, Appendices, and Export the Plan. At the bottom of the sidebar are 'Sign Out' and a back arrow. The main area is titled 'Abstract' and has 'View' and 'Help' buttons in the top right. Below the title is a rich text editor toolbar with icons for Bold (B), Italic (I), H2, H3, bulleted list, numbered list, link, and unlink. A red arrow points from a red box labeled 'Basic Formatting' to the bulleted list icon. The editor contains three paragraphs of placeholder text. The first paragraph starts with 'We are the market leaders in mobile telephony services...' The second paragraph starts with 'Transforming people's lives positively through an in...' The third paragraph starts with 'To achieve this vision, we will focus on three strategic priorities...' At the bottom right of the editor are 'Cancel' and 'Save' buttons.

# Foundation and Analysis

Foundation and Analysis are similar in format. Each section contains a fixed set of sub-sections. The main section will generate a main heading in the exported document. The sub-sections will generate sub-headings in the document.

By clicking on a main menu item, you will be presented with a text area for the section introduction.

By clicking on a sub-menu item, you will be presented with two text areas. The first allows you to enter a short statement, for example a Vision Statement. The second larger area allows you to enter a longer description, which is optional.

You do not have to add the section or subsection headings, these will be generated automatically.

Example of a vision statement with no additional description:

The screenshot shows a web application interface for Vodafone. On the left is a dark sidebar menu with the Vodafone logo at the top. Below the logo, it says 'STRATEGIC PLAN' and lists several menu items: Home, Abstract, Foundation (highlighted with a star), Analysis, Priorities, Elements, Projects, Financials, Appendices, and Export the Plan. At the bottom of the sidebar is a 'Sign Out' button. The main content area is titled 'Vision' and has a light blue header bar with 'View' and 'Help' buttons. Below the header, there are two text input areas. The first is labeled 'Vision Statement' and contains the text 'Transforming people's lives positively through an interconnected information society'. The second is labeled 'Vision Description' and is empty. Above the 'Vision Description' field is a rich text editor toolbar with icons for bold, italic, heading (H2, H3), bulleted list, numbered list, link, and unlink. At the bottom right of the form are 'Cancel' and 'Save' buttons.

Example of a purpose statement with an additional description:

The screenshot shows a web application interface for Vodafone. On the left is a dark sidebar with a 'STRATEGIC PLAN' section containing links to Home, Abstract, Foundation (highlighted), Analysis, Priorities, Elements, Projects, Financials, Appendices, and Export the Plan. The 'Foundation' section is expanded, showing 'Vision' and 'Purpose' (highlighted). The main content area is titled 'Purpose' and has 'View' and 'Help' buttons. It contains two text entry fields: 'Purpose Statement' with the text 'We will build a connected society' and 'Purpose Description' with a rich text editor toolbar and the text 'We will build a connected society that enhances socio-economic progress, embraces everyone, provides useful information and does not come at the cost of our planet. The two statements above will be used in our marketing and website literature.' At the bottom right are 'Cancel' and 'Save' buttons. A 'Sign Out' link is at the bottom left of the sidebar.

Vodafone

STRATEGIC PLAN

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- Appendices
- Export the Plan

Foundation

- Vision
- Purpose
- Core Values

Purpose

View Help

Purpose Statement

We will build a connected society

Purpose Description

**B** *I* H2 H3

We will build a connected society that enhances socio-economic progress, embraces everyone, provides useful information and does not come at the cost of our planet.

The two statements above will be used in our marketing and website literature.

Cancel Save

Sign Out

## SWOT

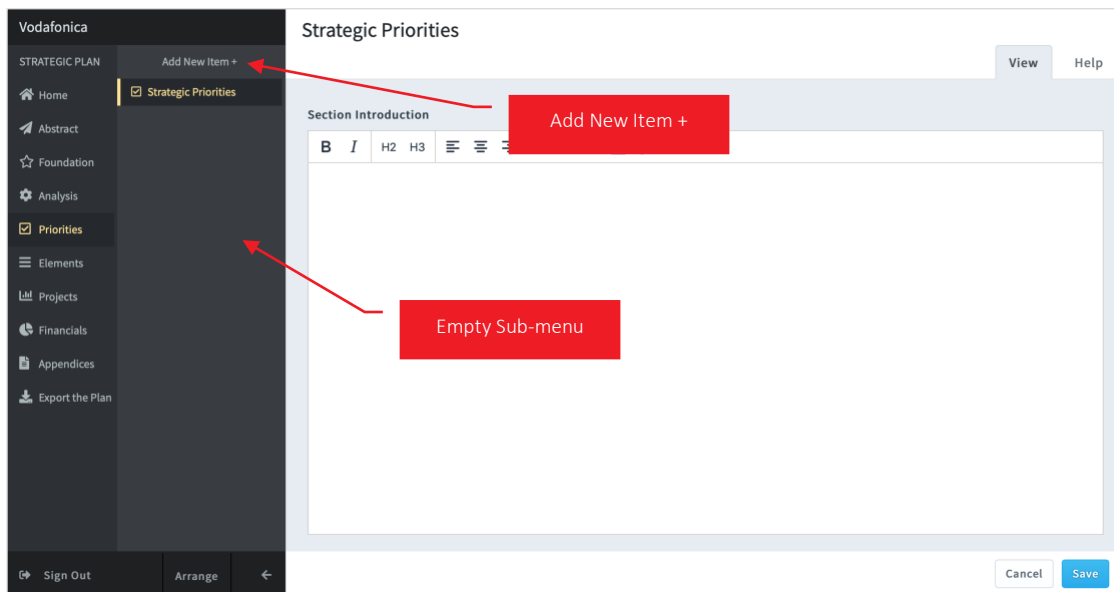
Each of the Foundation and Analysis areas follow the format above with the exception of SWOT which includes four separate text entry boxes for Strengths, Weaknesses, Opportunities, and Threats respectively. There is also a free form commentary box.



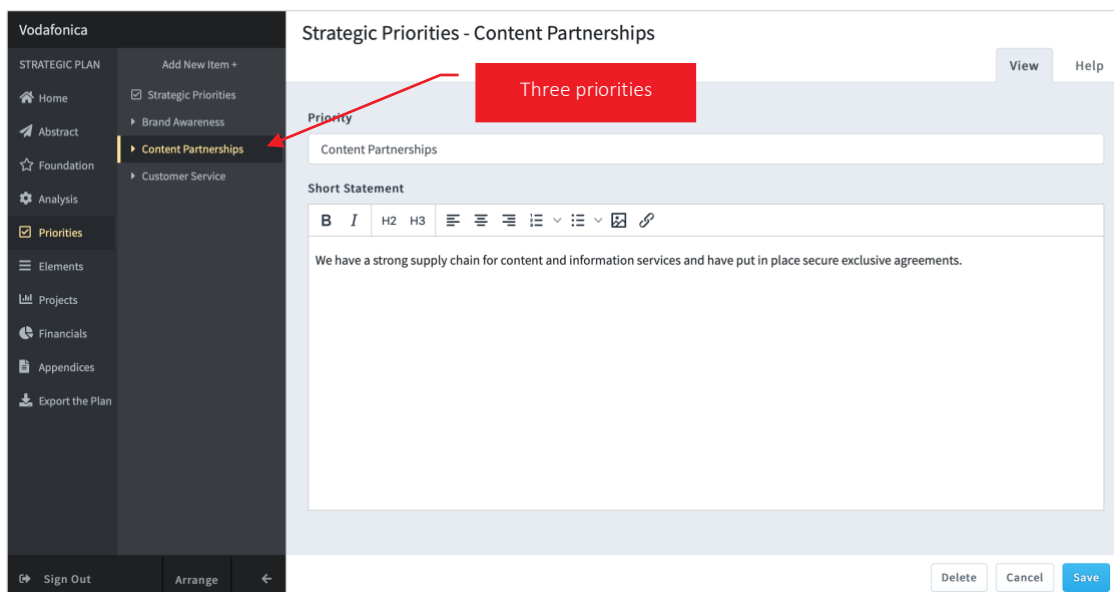
# Priorities

When you click on Priorities you will be presented with the Strategic Priorities section introduction.

**Important Note:** There is an empty sub-menu. You can add as many priorities as required by clicking on **Add New Item +** at the top of the sub-menu



Example with three priorities added:





We recommend three strategic priorities as being optimum for a strategic plan. For more information on creating the content for your strategy go to the Intrafocus [Strategic Planning Process \(SPP\)](#).

# Objectives (and Measures)

In the objectives section you can arrange your Objectives into 'Perspectives' and add 'Measures' (often called KPIs) to track the success of the Objectives.

To add a new Perspective, Objective or Measure:

Click on **Add New Item +** at the top of the list. it will default to **Perspective**, use the 'Element Type' drop-down and select the element you want.

It does not matter about the order in which you create the Perspectives, Objectives and Measures. They can be arranged later by using the **Arrange** button at the bottom of the list to drag and drop items in the list. If you use Arrange, be sure to Save the changes by using the blue Save button, bottom-right.

## Perspectives

These are high-level containers of Objectives. A Perspective could be a theme, a functional area or even a geography. The labels you provide are entirely up to you. The key thing to remember is that a perspective contains a number of Objectives. You **MUST** create at least one perspective before creating an Objective.

Select the Element Type **Perspective** to create a perspective

## Objectives

These are business Objectives, not personal objectives. They are **NOT** projects or initiatives. Typically, a business objective is an improvement activity and usually starts with one of the following words: Improve, Increase, Decrease, Reduce, Strengthen, Enhance, Maximise, Minimise.

For example, 'Improve Sales Revenue' is a financial objective. 'Improve Customer Satisfaction' is a customer-based objective.

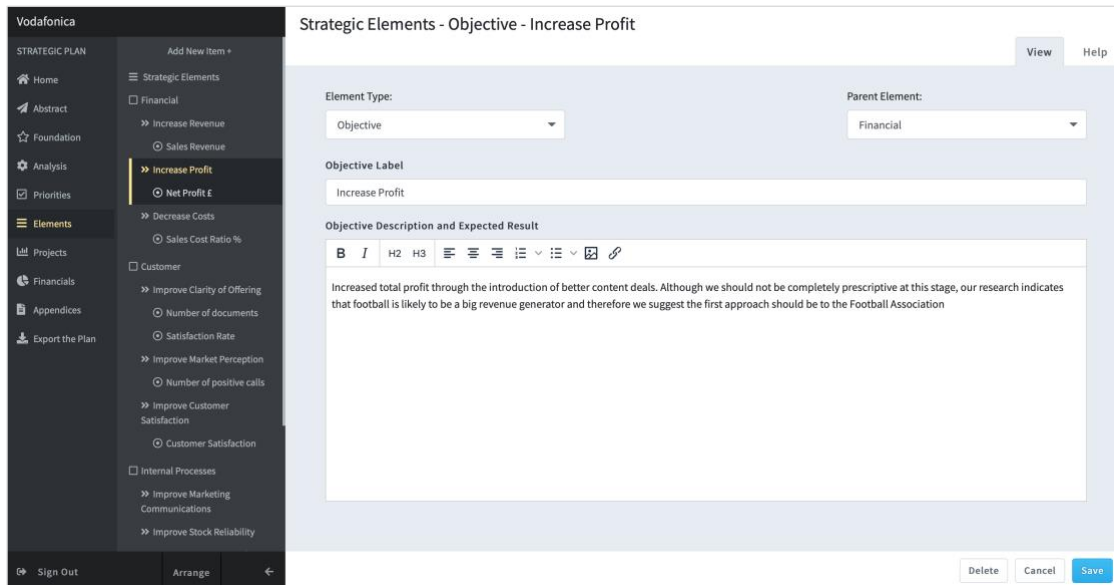
Read: [Strategic Objectives](#) for more information on this subject. You **MUST** create at least one Objective before creating a Measure.

## Measures

A measure, often called a KPI, is used to measure how well you are achieving an Objective. There may be multiple measures within an objective. We suggest you start small and have one or two key measures per objective. Measure usually

appear under Objectives, but you can place them directly under Perspectives if you wish.

The image below shows an example of a completed Elements section:



The screenshot displays the 'Vodafone' Strategic Elements interface. On the left is a dark sidebar with a 'STRATEGIC PLAN' section containing icons for Home, Abstract, Foundation, Analysis, Priorities, Elements (highlighted), Projects, Financials, and Appendices. Below this is an 'Export the Plan' button. The 'Elements' section is expanded, showing a tree structure: 'Strategic Elements' (with an 'Add New Item +' button) contains 'Financial' (expanded), which includes 'Increase Revenue' (with a sub-item 'Sales Revenue'), 'Increase Profit' (highlighted with a yellow bar, with a sub-item 'Net Profit £'), and 'Decrease Costs' (with a sub-item 'Sales Cost Ratio %').

The main content area is titled 'Strategic Elements - Objective - Increase Profit' and includes 'View' and 'Help' buttons. It contains the following fields and text:

- Element Type:** A dropdown menu set to 'Objective'.
- Parent Element:** A dropdown menu set to 'Financial'.
- Objective Label:** A text input field containing 'Increase Profit'.
- Objective Description and Expected Result:** A rich text editor with a toolbar (Bold, Italic, H2, H3, text alignment, list, link, unlink, undo, redo) and a text area containing the following text:
 

Increased total profit through the introduction of better content deals. Although we should not be completely prescriptive at this stage, our research indicates that football is likely to be a big revenue generator and therefore we suggest the first approach should be to the Football Association

At the bottom right of the main area are 'Delete', 'Cancel', and 'Save' buttons. The bottom of the sidebar contains a 'Sign Out' button, an 'Arrange' button, and a back arrow.

# Arranging Lists

You may have noticed the **Arrange** button at the bottom of the sub-menu. For sections where you can add items, you can also arrange them if you have created them in the wrong order.

Click on 'Arrange'. You will notice that the icons change. Drag and drop the items in the list to the correct position.

**Important:** When you have finished click Save

# Projects

Projects work in the same way as Priorities. When you click on Projects you will be presented with the Strategic Projects section introduction.

**Important Note:** There is an empty sub-menu. You can add as many Projects as required by clicking on **Add New Item +** at the top of the sub-menu.

The following example has three strategic projects added to the sub-menu:

The screenshot displays the Vodafone Strategic Projects interface. On the left, a dark sidebar contains a menu with options like Home, Abstract, Foundation, Analysis, Priorities, Elements, Projects, Financials, Appendices, and Export the Plan. The 'Projects' menu item is highlighted. A red arrow points from the 'Add New Item +' button in the sidebar to the main form area. The main form is titled 'Strategic Projects - Automate Contracts and Invoicing' and includes fields for Project Name, Start Date, Owner, and End Date. The Project Name field contains 'Automate Contracts and Invoicing', the Start Date is 'July 2020', the Owner is 'Paul Smith', and the End Date is 'November 2020'. A red box labeled 'Add New Item +' is positioned over the top right of the form. Another red box labeled 'Three strategic projects' is positioned over the Description field, which contains the text 'Go to tender for a new integrated Contract and Invoicing system'. At the bottom right of the form are buttons for 'Delete', 'Cancel', and 'Save'.

**Important Note:** Whenever you add a Project, a corresponding **Financial** element will be added as well. We assume that any Project has an associated cost.

# Financials

You will not be able to determine the exact costs in a strategic plan, but you can make cost-benefit estimates.

As mentioned above in projects, for every project a financial entry will be generated automatically. If you need to delete the item, you can. You can also add items if required.

Click on **Add New Item +** at the top of the sub-menu and fill in the details. Below is an example of a completed Financial section:

The screenshot displays the Vodafone Financials interface. On the left is a dark sidebar with the Vodafone logo and a 'STRATEGIC PLAN' section. Below this are icons for Home, Abstract, Foundation, Analysis, Priorities, Elements, Projects, Financials (highlighted), Appendices, and Export the Plan. The 'Financials' sub-menu is open, showing 'Add New Item +', 'Automate Contracts and Invoicing', 'Approach the Football Association' (highlighted), and 'Redesign the Football Website'. The main area is titled 'Financials - Approach the Football Association' and contains a table with three columns: 'Project Name or Cost Item', 'Expected Cost', and 'Potential Benefit'. The first row contains the values 'Approach the Football Association', '1,000,000', and '10's million'. At the bottom right of the table are 'Delete', 'Cancel', and 'Save' buttons. The bottom of the sidebar has 'Sign Out', 'Arrange', and a back arrow button.

Project Name or Cost Item	Expected Cost	Potential Benefit
Approach the Football Association	1,000,000	10's million

Notice that the financial elements are the same as the project elements.

# Appendices

The Appendices section includes a single free form text area. You can add anything you like to the Appendix. In this example a heading, text and an image has been added:

Vodafonea  
STRATEGIC PLAN  
Home  
Abstract  
Foundation  
Analysis  
Priorities  
Elements  
Projects  
Financials  
**Appendices**  
Export the Plan

## Appendices

View Help

Appendices

B I H2 H3

### Appendix 1 - Integrated Strategy Map

The following Integrated Strategy Map has been included for reference only. The map shows that a full set of business objectives, measures, targets and initiatives have been identified at the company level. Many of these will be cascaded as-is, some will be refined to suit the needs of our departments. The Integrated Strategy map will appear on the public intranet and will be posted on notice boards in selected areas.

Transforming people's lives positively through an interconnected information society				
Vision	We will build a connected society that enhances socio-economic progress, embraces everyone and does not come at the cost of our planet.			
Purpose	Content Partnerships	Customer Service	Brand Awareness	
Strategic Priorities	Strong supply chain for content and information services, exclusive agreements	Clarity in offering that surpasses anything in the market today, best user interface	Reimagined brand based on successes, attract a wider and younger audience	
Strategic Results				
Financial	Increase Revenue Increase Profitability Increased Operating Costs	KPIs Net profit Operating costs Revenue in target market	Targets + 1.5% per year - 1.5% per year + 1.12% per year	Projects Implement new financial accounting system Simplify billing operations
Customer	Improved Clarity of Offering Improved Market Penetration Improved Customer Satisfaction	KPIs % Market share index % Customer satisfaction index % New gross user index	Targets + 1.5% per year + 80% this year + 40% each fiscal annum	Projects Competitive and cost requirements market studies for new ad regions Improve the Offering's user experience Create regional offering selection process
Internal Processes	Innovation Innovation Innovation	KPIs New products as % of sales	Targets + 12% this year	Projects Develop new features for the Offering programme Transition resources for new

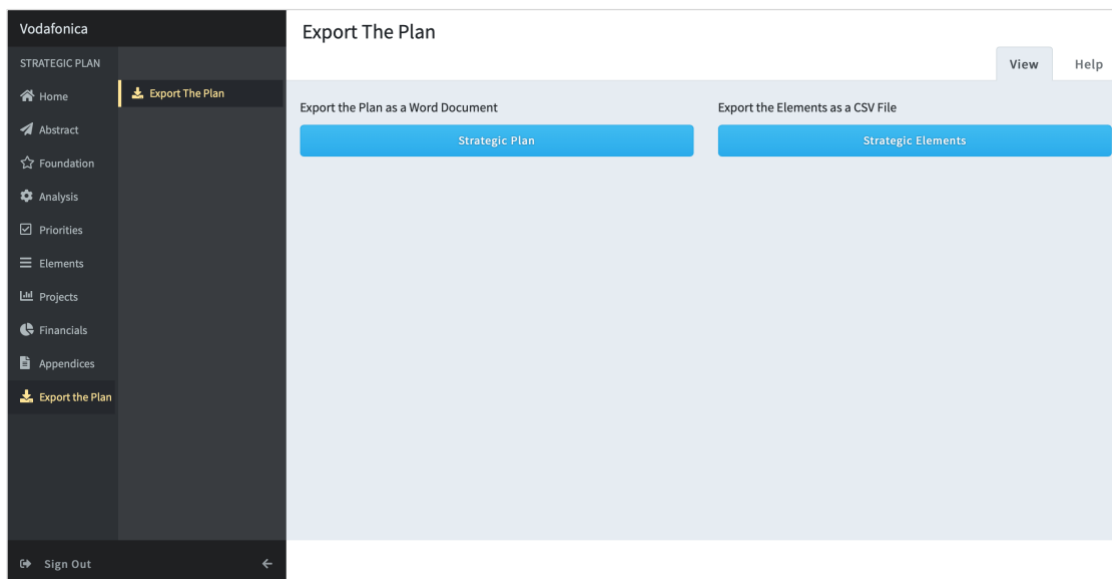
Cancel Save



# Export the Plan

## Strategic Plan

You can export the plan at any stage. Even on entry to the application. In fact, we recommend the first thing you do is fill in your details in the Document Setup sub-menu and export the plan. That way you will see what the application provides and what you need to add. Just click on the big blue Strategic Plan button.



## Strategic Elements

If you use a Key Performance Indicator (KPI) management system like [Spider Impact](#), you can also export your Strategic Elements into a spreadsheet format. Click on the big blue Strategic Elements button.

The spreadsheet will be constructed in the exact format required to build a scorecard in Spider Impact. It will not contain all of the information you need but it will give you a really good kickstart!



# Thank You

Thank you for using the strategic plan generator, we hope you find it useful. If you have any questions or need help, please feel free to [contact us](#) via the Intrafocus Helpdesk page at any time.

If you have bought this application via the Intrafocus website, then you should also check out our premium resources at the Intrafocus Academy of Strategic Planning: <https://www.intrafocus.academy/>