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# IDEABRIDGE



The IdeaBridge White Paper Series:  
Strategic Planning  
Questionnaire and Survey

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

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**Sample Letter Format and Questions for Strategic Planning Session**

Dear Participant,

You have been selected to help craft the future of our company.

On [enter the date and time], you will be participating on the team that will be developing the Strategic Plan to guide our company's efforts over the next several years. Your active and candid participation is essential in our planning process.

Attached you will find a detailed worksheet that will be used in our planning process. Please answer the questions completely and provide attachments or other detail as you see fit. Your responses will not be viewed by me and I will not see the results. Rather, you will forward your responses directly to our facilitator. The facilitator will consolidate all the comments and responses for your planning meeting.

As an important member of our team, you have valuable insight that we can all benefit from, so please be absolutely candid in sharing your thoughts and ideas on how we might improve our company.

The worksheet must be completed by [ insert deadline ] .

As we look toward our future, I am energized by the exciting opportunities that we will uncover through this process. Your participation is vital and greatly appreciated.

Sincerely,

[Insert name]  
President



**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**2**

**Strategic Planning Worksheet**

1. What should our company look like in three years? What services should we be providing? Will we have more employees, will our company be twice the size? Share your thoughts about where you think we should be headed and what we'll look like once we've arrived.

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2. List three external or internal factors that you believe could hinder our growth or your vision of our future.

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3. In a bullet-point format, please list all major projects or business initiatives that you or our team are working on. Just list the project or initiative, don't give too much detail, but be sure to list them all.

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4. Go right back up to the answers you just provided above.

- Step 1: Circle those projects or initiatives that could be a new source of revenue for OUR COMPANY.
- Step 2: Cross off (but do not erase!) those that you believe are a total waste of time or money.
- Step 3: Put two stars next to those projects that are simply "political" in nature. What we mean by "political" is that they really add no value to the company or to our clients, but for some special reason, we find ourselves working on them.



**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**3**

5. How do our clients perceive our company? What are they really saying about OUR COMPANY when we aren't around?

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6. What do you believe should be our Top three Strategic Initiatives in 2000? Be specific, but only list the top three most important for the future success of the company.

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7. Describe the culture of our company. What do we, as a company, hold as our important attributes?

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8. How would you characterize communications at our company? Direct? Insufficient. Adequate? How could we improve?

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9. What are the three primary strengths of our company?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**4**

10. What areas of the company are we weakest? How could we improve? Please give specifics.

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11. List three additional markets that we are not serving which could be entered using our strengths.

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12. What kind of work are we best at and in what areas do we clearly perform better than our competitors? In what areas do we truly have a unique competitive advantage over our competitors?

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13. What geographic areas should we service?

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14. Should our company have a marketing and sales focus? If so, who should lead that effort? Does this require a full time effort by a business development team, or can we all share equally in the responsibility to grow our company?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**5**

15. Should our company have a defined bonus and incentive plan that is based on results? If so, how might such a plan be structured?

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16. Should employees receive an annual review that outlines specific objectives and ties any potential salary or benefit increases directly to achieving measurable performance objectives?

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17. Other than salary and bonuses, are there other compensation or benefit programs that we should be offering? Please be specific?

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18. If we had to double our business in 5 years, where would we focus and what would we do?

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19. If you were named CEO of our company, what three reports, policies or programs would you immediately eliminate? Why?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**6**

20. If you were named CEO of our company, what three programs projects or initiatives would you immediately launch? Why?

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21. If you owned 100% of the company, and all profits or losses were yours alone, what changes would you immediately make?

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22. Rank the services we provide, best to worst. Which services have the greatest opportunity for long term growth and profits?

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23. Describe our toughest competitor. What makes them so hard to compete with.

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24. What areas of expertise do you feel we are lacking?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**7**

25. What constitutes "good service" in the minds of our clients?

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26. How important do you feel computerization is to our clients?

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27. What tools would you like our staff to have to aid them in their work?

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28. Do you feel we need more decision makers? More workers? Or both?

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29. Do you use E-mail? The Internet? How? How does our company rank in regard to the use of technology?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**8**

30. How could we better employ technology as a tool to improve productivity in the company?

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31. List the most important traits we should look for when hiring new people to work for our company.

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32. Identify the specific positions we need to fill, add or replace to improve our company.

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33. What traits should people in these roles have?

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34. How do our benefits compare with other companies? How could they be improved? Be specific.

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

9

35. Identify one thing we could do better today to improve the human resources effort in our company.

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36. Do our people really know what authority level they have?

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37. Suppose you were given 90-days of unlimited authority to make any changes, add any staff, pursue any initiative or eliminate anything or anyone. Nothing was off limits. The monetary results of your decisions and actions would be measured over an 18 month period and any profits resulting from your actions would be yours alone. What exactly would you do? Simply eliminating people doesn't help if our clients aren't delighted and if the work doesn't get done. So what are you going to do to improve the business while also keeping our clients happy?

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38. Are you satisfied that we generally pay our employees a fair compensation package? Would our employees agree with your answer?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

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39. Where could we earn additional revenue or fees?

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40. What could be done to ensure that our employees feel respected, appreciated and happy with their association with our company?

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41. Should the financial performance of the company be communicated to all levels of management and all employees? If not, who should know how we are performing?

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42. Who is responsible for making money for our company? Should your pay, raises and bonuses be somehow tied to our financial performance? If not, what metrics should be used to determine overall compensation? Please be specific.

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43. If you had to make \$200,000 in quick expense cuts, but employees, salaries and customer service were off limits, what would you do? What would you eliminate?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

44. What could we do to immediately increase our annual revenue by 25% next year?

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45. What impact does the economy have on our finances?

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46. List three things you, your team or any other department can do today to improve the finances of our company.

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47. What advice would you give the executive management team of our company?

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48. What are the biggest mistakes we are making as a company?

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**STRATEGIC PLANNING QUESTIONNAIRE AND SURVEY**

**12**

49. As we enter this Strategic Planning Process, please list those areas that are absolutely critical that we focus on. These are the major themes that we *must* explore in our planning session:

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