

lewis &  
coleman

# PLANNING

## CORPORATE PLAN

10 years

## STRATEGIC PLAN

5 years

## BUSINESS PLAN

1-3 years

## BRANCH PLAN

1 year

## INDIVIDUAL ACTION PLAN

1-12 months

- What do you really need?
- How to ensure it works?
- How to keep it up to date?
- Can it be made simpler?

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## Strategic Planning

Facilitation of planning sessions  
Documentation of plans  
Development & review of key performance indicators

## Business Plans

Investment logic maps  
Assistance with preparation of business cases  
Review and development of business plans  
Establish KPIs that ensure reporting informs ongoing planning and refining current plans

## Corporate planning

Review of current processes and policies  
Development of systems for managing corporate planning from long term to individual performance plans

## Branch Planning

Branch level translation of long term strategy into annual work plans

## Individual Action Plan

Establish the link between individual's commitment to the overall process as well as guiding routine activities using this tool  
Generate reports can on progress  
Plans can be generated by all staff using our simple tools

## Plan Adjustment

A simple routine allows ongoing plan adjustment at all levels as people react to issues and changes as they work