From SWOT to Strategy Execution: How a Philippine Manufacturing Company Built a Five-Year Strategy Map, Balanced Scorecard, KPIs, and Departmental Action Plans

An Anonymized Strategic Planning Consultancy and Facilitation Case Study in the Philippines

Confidentiality Notice: This case study intentionally withholds the client organization's name, brand names, logos, owners' and executives' identities, employees' identities, exact locations, financial information, revenues, costs, sales volumes, staffing figures, customer information, proprietary targets, detailed internal weaknesses, competitive intelligence, operational specifications, system information, and other confidential or identifying information. Certain dates, figures, targets, and business details have also been generalized. The purpose of this case study is to demonstrate the **strategic planning consultancy and facilitation methodology, documented outputs, and transferable lessons** without disclosing information that could disadvantage or identify the client.

Strategic Planning Consultant in the Philippines Case Study: When a Two-Day Workshop Became a Complete Strategy-to-Execution Process

A strategic planning engagement can begin with a deceptively simple request:
“Can you facilitate our strategic planning?”

But when the organization is an established Philippine manufacturing and distribution company with multiple operating locations, nationwide market coverage, several functional departments, production capabilities, a sizeable workforce, competing priorities, changing technology, customers across different markets, and ambitions for further growth, two days of discussion are rarely enough by themselves.

That was the situation behind this engagement.

The client was an **established Philippine building materials manufacturing and distribution company with multi-site operations and nationwide commercial coverage**.

Its leadership wanted to determine the organization's long-term direction for the succeeding three to five years.

The initial requirement was for a face-to-face strategic planning workshop involving members of the company's executive and management leadership teams. But the design of the engagement recognized that producing a meaningful long-term plan would require much more than gathering leaders in a room and asking them to brainstorm goals.

The engagement therefore evolved into a more complete process involving:
Pre-Planning Diagnosis → Organizational Review → SWOT → Root Cause Analysis → Environmental Scanning → Strategic Priorities → Strategy Map → Strategic Objectives → Balanced Scorecard → KPIs and Targets → Strategic Initiatives → Departmental Action Plans → Strategic Plan Documentation → Performance Review

The project plan itself distinguished among **pre-planning work, the planning proper, and post-planning work**, with documented outputs including internal and external analyses, strategic priorities, a Strategy Map, organizational measures and targets, organizational initiatives, and a finalized five-year strategic plan document.

That distinction became one of the most important lessons from the engagement:
Strategic planning is not simply an event. It is a management process that should eventually connect diagnosis, choices, measurements, ownership, execution, and review.

The Client Situation

The organization had already been operating successfully for many years.

It had established:

- manufacturing operations;
- several operating locations;
- nationwide market reach;
- an established brand;
- an existing customer base;
- experienced employees;
- multiple functional departments;
- technology and production assets; and
- leadership committed to improving the organization.

But organizational maturity creates a different kind of strategic challenge.

The systems, practices, structures, and management habits that help a company reach one stage of growth may not necessarily be sufficient for its next stage.
The strategic planning process therefore needed to address a fundamental question:
How should an established Philippine manufacturing company evolve its strategy, systems, people, processes, customer experience, technology, and market approach to support its next stage of growth?

That question required more than a Vision-Mission workshop.

It required the planners to understand:
Where have we been?
Where are we now?
What is happening around us?
Where do we want to go?
What needs to change?
How will we measure success?
And what will each part of the organization actually do about it?

Why the Engagement Needed More Than a Traditional SWOT Workshop

The client had different departments looking at the business through different lenses.

Sales naturally saw customers, territories, competition, quotations, conversion, and market opportunities.

Operations saw process efficiency.

Production and maintenance saw machinery, productivity, capacity, equipment reliability, and manpower.

Human Resources saw organizational structure, recruitment, capability, performance management, employee experience, and culture.

Finance and Accounting saw resource management and financial controls.

IT saw infrastructure, integration, automation, and systems.

Supply Chain saw inventory, suppliers, procurement, warehousing, and availability.

Marketing saw market development and brand visibility.

Quality functions saw standards, compliance, product quality, and process consistency.

None of those perspectives was wrong.

But none of them represented the whole organization either.

A major responsibility of the **Strategic Planning Consultant and Facilitator** was therefore to help leadership transform different departmental realities into **one organizational strategy**.

Phase 1: Designing the Strategic Planning Engagement Before Entering the Planning Room

One of the strongest features of the engagement was the deliberate pre-work.

The facilitation framework required the organizers and consultants first to answer fundamental questions:

- Who should participate?
- What should participants accomplish?
- What issues should the strategic plan address?
- What previous planning outputs existed?
- What was the current Vision, Mission, and Values framework?
- What planning horizon should be used?
- What important internal and external information should participants prepare?

Participants were also prompted to think before the formal planning session about:

- important developments in the external environment;

- organizational threats;
- opportunities;
- strengths;
- weaknesses;
- challenges that had not been successfully addressed;
- areas where the organization had performed well; and
- outcomes they wanted from strategic planning.

This helped reduce one of the biggest risks in strategic planning:
People entering the planning room unprepared and relying only on whatever ideas happen to occur to them that day.

Phase 2: Using a Pre-Strategic Planning Questionnaire to Gather Leadership Perspectives

The pre-work was further supported by a structured **Pre-Strategic Planning Questionnaire** intended to help establish the company's long-term direction.

The questionnaire was designed for perspectives coming from several leadership levels, including board, top management, middle management, and frontline management roles.

It asked planners to examine topics including:
- the continuing relevance of organizational direction;
- strategic measures and targets;
- previous performance against organizational objectives;
- organizational structure;
- staffing adequacy;
- future organizational requirements;
- economic conditions;
- political developments;
- laws and regulations;
- market conditions;
- technology;
- customer behavior; and
- expectations concerning industry growth.

The questionnaire was not intended to make strategic decisions by survey.

Its value was diagnostic.

It helped surface assumptions, concerns, and perspectives that could be discussed and challenged during the planning process.

Phase 3: Looking Back Before Planning Forward

The eventual strategic plan document begins its organizational situational analysis with a **Past Analysis**.

Participants were guided to examine how previous decisions helped create the organization's current state.

Rather than asking only:
"What did we accomplish?"

the planners examined questions such as:

- What did we do?
- What did we fail to do?
- What did we do that did not work?
- What did we fail to do that might have worked?
- Which activities continued despite questionable effectiveness?

The final strategic plan documentation explicitly records this retrospective reasoning before proceeding to present-state internal and external analysis.

This matters because organizations sometimes create a new strategic plan without learning from the old one.

A new plan does not automatically solve an old execution problem.

If the organization does not understand **why previous commitments succeeded or failed**, it may simply repeat them under different wording.

Phase 4: Conducting an Internal Organizational Audit

The process then examined the company's present internal condition.

The strategic planners assessed strengths and weaknesses involving areas such as:

- financial management;
- customers and customer experience;
- product and service quality;
- internal processes;
- organizational capability;
- people systems;
- information technology;
- equipment and other physical resources;
- communication;
- organizational structure; and
- management practices.

The finalized strategy document organized the internal analysis across the same broad dimensions that would later feed into the Balanced Scorecard.

Importantly, the purpose was not to publish a list of everything that was wrong with the organization.

It was to identify the internal conditions that had **strategic implications**.

For confidentiality reasons, this public case study deliberately does not reproduce the client's detailed internal weaknesses.

Phase 5: Going Beyond Weaknesses Through Five Whys Root-Cause Analysis

Simply identifying a weakness is not enough.

Consider statements such as:

- "Processes are slow."
- "Customer service needs improvement."
- "Employee turnover is high."
- "Departments do not coordinate."
- "We need more people."
- "Our technology needs improvement."

These may be legitimate problems.

But they are not necessarily root causes.

The pre-planning methodology therefore included a dedicated **Five Whys Analysis Tool** that required participants to begin with an internal weakness or problem statement and repeatedly examine its causal factors until an underlying root cause could be identified.

The dedicated SWOT workshop similarly included facilitated discussions and workshops on root cause analysis before the planners finalized their internal weaknesses.

This was a critical design decision.

Why?

Because a strategy aimed at the wrong cause can create years of activity without solving the actual problem.

The objective was not merely to describe organizational pain. It was to identify where strategic intervention could produce meaningful change.

Phase 6: Environmental Scanning Through PESTLE

The company's strategy also had to respond to forces outside its direct control.

A dedicated **PESTLE template** was used to structure thinking around:

- Political factors
- Economic factors

- Social factors
- Technological factors
- Legal factors
- Environmental factors

The pre-work templates explicitly connected these external dimensions with the identification of opportunities and threats.

The strategic planning proposal likewise required planners to investigate political, economic, social, technological, legal, and environmental factors that could directly or indirectly affect future success.

In a Philippine manufacturing and building materials environment, this type of scan can help leadership consider issues such as:

- Construction industry growth;
- changes in customer behavior;
- technological advances;
- evolving competition;
- supplier conditions;
- labor market developments;
- importation or regulatory conditions;
- digital channels;
- infrastructure trends;
- natural disasters;
- and changing market expectations.

The client's actual analysis contained significantly more detail. Those specifics are intentionally not reproduced here.

Phase 7: Consolidating SWOT as an Input to Strategy—Not as the Strategy Itself

The internal and external analyses were consolidated into a formal SWOT.

But SWOT was treated as a source of strategic choices rather than the final output.

The planning templates explicitly positioned SWOT as the internal-external summary **from which strategies would be generated**.

The final strategic plan later explains that the company's strategies were intended to:

- strengthen internal advantages;
- correct, replace, enhance, align, time, or eliminate weaknesses where appropriate;
- leverage external opportunities; and
- respond to external threats.

This distinction is essential.

SWOT asks:
What conditions exist?

Strategy asks:
What are we going to do because those conditions exist?

Phase 8: Reviewing the Company's Vision, Mission, and Values

The process also examined whether the company's organizational philosophy remained relevant.

The eventual strategic plan documentation shows that management chose to **retain its fundamental Vision, Mission, and Values direction** rather than changing them merely for the sake of saying that the strategic planning produced something new.

That is an important strategic planning lesson.

A consultant should not force a client to rewrite its Vision and Mission simply because rewriting them is expected during a workshop.

Sometimes the correct strategic decision is:

Retain.

Sometimes:
Refine.

Sometimes:
Replace.

The project plan therefore appropriately defined the output as a Vision-Mission-Values framework that could be **revised, retained, or reworded**, depending on what the planning process determined.

Phase 9: Converting Strategic Issues Into a Strategy Map

Once the analysis was sufficiently developed, the engagement moved from diagnosis to strategy formulation.

The formal planning agenda required the participants to convert SWOT findings into priority strategic goals through a **Strategy Map Framework**.

The strategic goals were organized using Balanced Scorecard perspectives covering:

- **Financial**
- **Customer**
- **Internal Processes**
- **Organizational Capacity / Learning and Growth**

The final strategic plan document confirms that the organization ultimately developed an integrated Strategy Map consisting of strategic goals and strategic objectives connected to an organizational Balanced Scorecard.

This moved the conversation away from isolated departmental concerns toward enterprise-level strategic themes.

Phase 10: Formulating S.M.A.R.T.E.R. Strategic Objectives

Strategic goals describe the destination.

Strategic objectives explain how the organization intends to get there.

The planning methodology therefore required objectives to meet the **S.M.A.R.T.E.R.** standard:

- Specific
- Measurable
- Achievable/Attainable
- Relevant
- Timely/Time-bound
- Evaluable/Evaluated
- Recorded/Reported

The agenda also specifically required each strategic objective to be connected with:

- a measure;
- a target; and
- eventual initiatives.

This created a crucial shift.

Instead of saying:
“Improve our organization.”

leadership had to define what improvement would actually look like.

Instead of saying:
“Improve customer service.”

the organization needed to determine what measurable condition would indicate that customer experience was improving.

Instead of saying:
“Improve our people.”

it had to determine the people-related outcomes required to support strategy.

Phase 11: Developing the Balanced Scorecard

The Strategy Map established the strategic logic.

The **Balanced Scorecard** established how management would measure whether that strategy was progressing.

The planning framework moved systematically from:
Strategic Goal → Strategic Objective → Measure → Target

The company's working Strategy Map and Balanced Scorecard contained organizational objectives addressing broad themes such as:

- financial management;
- customer experience;
- product and service quality;
- marketing and sales capability;
- streamlined internal processes;
- cross-functional communication;
- organizational culture;
- employee experience;
- people development;
- technology;
- physical assets; and
- competitive position.

The exact measures, numerical targets, financial expectations, sales volumes, market share goals, staffing targets, operational metrics, and other sensitive commitments are deliberately withheld from this public case study.

Phase 12: Teaching Leaders How to Think in KPIs, Not Just Activities

One challenge in strategic planning is helping managers distinguish:
What we will do from **what result we expect the activity to produce**.

The KPI development materials used during the engagement introduced **Key Result Areas** as areas in which results need to occur and **Key Performance Indicators** as measurable values demonstrating how effectively the company, department, or person is achieving key objectives.

That distinction helped shift thinking from:

Activity: Conduct training.

to something closer to:

Result: What capability or performance improvement should the training create?

Or from:

Activity: Improve marketing.

to:

Result: Which market, customer, conversion, awareness, or revenue outcome should improve?

This is one reason a **Strategic Planning Trainer** can add value inside a strategic planning consultancy.

Participants may need to learn the management concepts they are being asked to apply before they can produce strong outputs.

Phase 13: Developing Strategic Initiatives With Departmental Ownership

A target without an initiative is only a desired number.

The second day of planning therefore required departments and functional groups to develop initiatives that could execute the strategic goals and objectives.

Each group was expected to act as an:

- owner;
- enabler;
- contributor; or
- point person

for initiatives tied to strategic objectives and performance targets.

The departmental action plan template explicitly linked:
Strategic Goal → **Strategic Objective** → **Measure** → **Target** → **Departmental Initiatives** → **Key Result Areas** → **KPIs**.

This helped prevent the five-year plan from remaining exclusively at the executive level.

Phase 14: Cross-Functional Alignment and Critique

Perhaps one of the most important parts of the engagement was alignment.

Departments do not execute strategy independently.

A Sales initiative might require Marketing.

Marketing may need IT.

IT may require Finance.

Finance may depend on accurate inputs from Operations.

Production capacity influences Sales commitments.

Supply Chain affects Production.

HR affects every department's ability to execute.

The facilitation methodology therefore required objectives to be tested not only against the corporate Vision, Mission, and Values, but also against the departments and individuals that would be affected by them.

Participants were expected to critique one another's proposed objectives, identify positive or negative cross-functional impacts, and recommend adjustments before finalization.

The formal agenda concluded with an organization-wide critique and agreement on:

- strategic goals;
- strategic objectives;
- measures;
- targets; and
- organizational initiatives,

resulting in a finalized Balanced Scorecard.

This is why strategic planning facilitation is more than keeping time and passing a microphone.

A good **Strategic Planning Facilitator** helps different functions create **one strategy instead of several departmental wish lists**.

Phase 15: Turning the Workshop Into a Formal Five-Year Strategic Plan

The planning proper was followed by post-planning documentation.

The project plan explicitly included **Strategic Plan Write-Up Finalization** after the workshop itself.

The resulting document went well beyond meeting notes.

It consolidated:

- organizational situational analysis;
- past analysis;
- internal analysis;
- external environmental analysis;
- SWOT;
- organizational strategies;
- Strategy Map;
- strategic objectives;
- measures;
- targets;
- multi-year initiatives;
- and departmental responsibilities.

The finalized strategic plan document itself identifies the work as **facilitated, critiqued, and consolidated by the Strategic Planning Consultant/Facilitator** and subsequently reviewed, evaluated, and approved by the organization's chief executive.

That is an important distinction between:

facilitating a planning workshop

and

supporting the development of an actual strategic management framework.

Phase 16: Building a Strategic Review Mechanism After Planning

The uploaded project materials also show an important follow-through component: **Annual Business Review templates** were prepared for various organizational functions.

These templates did not merely ask departments:
"What did you do this year?"

They required managers to revisit the strategic objective, initiatives, measures, and targets and then answer questions such as:

- What activities were undertaken?
- What was actually accomplished?
- If the target was not achieved, why?
- What should be done to catch up?
- If it was achieved, what should happen next to continue advancing the strategic objective?

Similar review logic was applied across other organizational functions.

This represents an important maturity step:
Strategy should not be reviewed only when it is time to create another strategy.

It should become part of management review.

What the Engagement Ultimately Produced

Based on the project files, the engagement produced an integrated strategic planning architecture that included:

Component	Documented Output
Pre-Planning	Leadership inputs and information gathering
Strategic Diagnosis	Past and present organizational analysis
Internal Analysis	Strategic strengths and weaknesses
Root-Cause Analysis	Five Whys methodology
External Analysis	PESTLE environmental scanning
Strategic Inputs	Consolidated SWOT

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Component	Documented Output
Organizational Direction	Reviewed Vision, Mission, and Values
Strategic Prioritization	Enterprise strategic goals
Strategy Architecture	Strategy Map
Objectives	S.M.A.R.T.E.R. strategic objectives
Performance Management	Balanced Scorecard
Measurement	Organizational KPIs/measures
Expectations	Multi-year targets
Execution	Strategic initiatives
Ownership	Departmental responsibilities
Cascading	Departmental action plans and KRAs/KPIs
Documentation	Formal five-year strategic plan
Follow-Through	Annual Business Review templates

The materials therefore show a movement from **strategic discussion** toward a more structured **strategy management system**.

The Transformation: Before the Process vs. After the Process

Because the source materials do not constitute an independent post-implementation impact study, this case study does **not** claim unverified improvements in revenue, profit, market share, employee retention, productivity, customer satisfaction, or any other subsequent business result.

What the documentation does demonstrate is the transformation in the organization's **planning architecture**:

Before / Starting Point	After the Strategic Planning Process
Different departmental perspectives	Consolidated organizational view
Internal observations	Structured organizational audit
Identified weaknesses	Root cause examination
External developments	Structured environmental scan
SWOT findings	Strategy generating inputs
General aspirations	Strategic goals
Strategic goals	S.M.A.R.T.E.R. strategic objectives
Objectives	Defined measures
Measures	Multi-year targets
Targets	Strategic initiatives
Initiatives	Departmental ownership
Individual department plans	Cross-functional alignment

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Before / Starting Point	After the Strategic Planning Process
Strategic planning workshop	Formal strategic plan document
Plan document	Annual review mechanism

That distinction matters.

A responsible case study should differentiate **documented planning outputs** from **later operational results that have not been independently verified**.

What Made This Strategic Planning Consultancy Different?

1. The engagement started before the workshop
There was pre-work, information gathering, diagnostics, participant preparation, templates, and strategic analysis.

2. SWOT was treated as an input—not the final product
The planners had to translate findings into strategic choices.

3. Root cause analysis was deliberately incorporated
Weaknesses were not automatically accepted at face value.

4. The external environment was analyzed systematically
PESTLE helped prevent an overly inward-looking strategy.

5. The Balanced Scorecard connected strategy with measurement
The plan did not stop at objectives.

6. KPIs and targets were tied to strategic objectives
Performance measurement was expected to answer whether the strategy was progressing.

7. Strategic initiatives were assigned to organizational functions
Responsibility was brought closer to execution.

8. Departments critiqued one another's plans
Cross-functional dependencies became part of the strategic conversation.

9. The planning output was documented after the event
The consultancy went beyond workshop facilitation.

10. Annual Business Reviews created a mechanism for strategic follow-through
The organization had a structure for examining accomplishments, gaps, causes, and next actions.

Lessons for Philippine Manufacturing Companies

Lesson 1: Growth can expose systems that have not matured as quickly as the business

An organization may be successful and still need better systems.

Growth creates complexity.

More branches, more customers, more people, more equipment, more departments, and more transactions increase the need for strategic alignment.

Lesson 2: Departments naturally optimize for their own realities

Finance sees financial control.

Sales sees customers and revenue.

Production sees capacity.

HR sees people.

IT sees systems.

Supply Chain sees availability.

Strategy must determine what the **organization as a whole** needs.

Lesson 3: "We need more people" is not automatically a strategy

Sometimes the real answer is:

- process redesign;
- automation;
- role clarification;
- better technology;
- capability development;
- improved coordination;
- restructuring; or
- different resource allocation.

Root cause analysis should precede expensive solutions.

Lesson 4: A Balanced Scorecard is more than a KPI list

A KPI spreadsheet does not automatically constitute a Balanced Scorecard.

The sequence matters:
Strategy → Objective → Measure → Target → Initiative

Without that logic, organizations can become very good at measuring activities that have little strategic importance.

Lesson 5: Strategy has to cross departmental boundaries

One department can rarely achieve an enterprise-level objective by itself.

Strategic planning therefore needs conversations about:
Who owns this?
Who enables it?
Who is affected by it?
What has to happen first?
What dependency could prevent success?

Lesson 6: Strategy needs a review rhythm

A strategic plan should not disappear into a shared drive after approval.

Management should regularly ask:
What did we commit to?
What happened?
Why are we ahead or behind?
What changed?
What do we do next?

What Does a Strategic Planning Consultant in the Philippines Do?

A **Strategic Planning Consultant in the Philippines** helps organizations diagnose their present condition, understand their internal and external environment, clarify strategic issues, formulate strategic choices, develop measurable objectives, establish performance measures and targets, align initiatives, assign ownership, and create mechanisms that help move strategy toward execution.

The consultant may support:

- pre-planning diagnostics;
- leadership consultation;
- strategic analysis;
- framework design;

- KPI development;
- Balanced Scorecard development;
- Strategic plan documentation;
- cascading;
- and post-planning review.

What Does a Strategic Planning Facilitator in the Philippines Do?

A **Strategic Planning Facilitator in the Philippines** manages the process through which leaders create and agree on strategy.

The facilitator helps participants:

- think strategically;
- challenge assumptions;
- distinguish causes from symptoms;
- surface disagreements;
- prioritize issues;
- connect departmental concerns;
- formulate measurable objectives;
- critique proposed strategies;
- reach alignment;
- and convert discussions into decisions.

The facilitator does **not** replace management's judgment.

Management owns the strategy.

What Does a Strategic Planning Trainer in the Philippines Do?

A **Strategic Planning Trainer in the Philippines** builds participants' capability to understand and apply tools such as:

- Strategic Thinking
- SWOT Analysis
- Five Whys
- Root Cause Analysis
- PESTLE
- Strategy Maps
- Balanced Scorecards
- Key Result Areas
- KPIs
- Target Setting
- Strategic Initiatives
- Tactical Planning
- Action Planning
- Strategy Execution

This training role can be integrated into actual strategic planning so that managers understand the tools rather than simply filling out templates.

What Can a Strategic Planning Coach in the Philippines Do After the Workshop?

A **Strategic Planning Coach** can work with business owners, executives, planning leaders, or department heads after the planning proper to help them:

- review strategic assumptions;
- prioritize competing demands;
- diagnose execution gaps;
- conduct strategic reviews;
- strengthen accountability;
- make corrective decisions;
- and keep leadership attention focused on strategic priorities.

Planning creates the direction.

Coaching can help leaders maintain the discipline required to execute it.

When Would an Organization Need a Strategic Planning Speaker?

A **Strategic Planning Speaker in the Philippines** may be appropriate when an organization wants to introduce strategic thinking to a larger group before a planning activity or help employees understand:

- why strategy matters;
- how their work connects with organizational goals;
- why KPIs exist;
- how departments contribute to strategy;
- and why execution requires alignment.

A keynote or learning session cannot replace strategic planning, but it can create awareness and readiness for it.

Strategic Planning Consultant vs. Facilitator vs. Trainer vs. Coach vs. Speaker

Role	Primary Contribution
Strategic Planning Consultant	Analysis, frameworks, recommendations, strategic challenge and advisory
Strategic Planning Facilitator	Process management, participation, alignment and decision-making
Strategic Planning Trainer	Capability-building and understanding of strategic tools
Strategic Planning Coach	Leadership thinking, accountability and execution follow-through
Strategic Planning Speaker	Awareness, inspiration and strategic management education

Some organizational engagements may require only one role.

More comprehensive engagements may combine several.

Frequently Asked Questions About Strategic Planning Services in the Philippines

What should be included in a five-year strategic plan?
A comprehensive strategic plan may include organizational direction, situational analysis, strategic issues, strategic goals, strategic objectives, a Strategy Map, KPIs or measures, performance targets, strategic initiatives, departmental ownership, and a review mechanism.

Is SWOT analysis enough for strategic planning?
No.

SWOT identifies important internal and external conditions. Those findings still need to be translated into strategic decisions, objectives, measures, targets, initiatives, and execution responsibilities.

What is the difference between SWOT and PESTLE?
SWOT summarizes internal strengths and weaknesses and external opportunities and threats.

PESTLE provides a structured way of examining the political, economic, social, technological, legal, and environmental forces that may contribute to those opportunities and threats.

Why use the Five Whys in strategic planning?
The Five Whys helps planners identify underlying causes rather than designing strategies around visible symptoms.

What is a Strategy Map?
A Strategy Map organizes and connects an organization's strategic objectives to show how different priorities contribute to the desired future.

What is a Balanced Scorecard?
A Balanced Scorecard translates strategy into measurable objectives, performance measures, targets, and strategic initiatives across multiple organizational perspectives.

How are KPIs used in strategic planning?
KPIs help management determine whether strategic objectives are progressing. A good KPI should measure something strategically meaningful rather than simply count activity.

Should departments create their own strategic plans?
Departments should develop their own contributions and action plans, but these should cascade from and remain aligned with the enterprise strategy rather than become separate and competing strategies.

What should happen after a strategic planning workshop?
The organization should finalize documentation, assign owners, cascade priorities, execute initiatives, review KPIs, conduct periodic business or strategy reviews, diagnose gaps, and make corrective decisions.

Can strategic planning be completed in two days?
A two-day workshop can be sufficient for the **planning proper** when participants are well prepared, but a more comprehensive engagement may also require pre-work, data gathering, diagnosis, documentation, refinement, cascading, and follow-through after the workshop.

This case demonstrates precisely why the quality of what happens **before and after** the formal planning session matters.

Looking for a Strategic Planning Consultant or Facilitator in the Philippines?

Mentor Myron Sta. Ana – Your Strategy Guy helps organizations move beyond planning exercises toward more structured strategic-management systems.

Depending on the organization's needs, strategic planning services may include:

- Strategic Planning Consultancy
- Strategic Planning Facilitation
- Strategic Planning Training
- Strategic Planning Speaking
- Strategic Planning Coaching
- Pre-Strategic Planning Assessment
- Business and Organizational Review
- Vision, Mission, and Values Facilitation
- SWOT Analysis
- Root-Cause Analysis
- Five Whys Facilitation
- PESTLE Environmental Scanning
- Competitor Analysis
- Strategic Issues and Priorities
- Strategy Map Development
- Balanced Scorecard Development
- KPI Development
- Target Setting
- Strategic Initiative Development
- Departmental Cascading
- Tactical Planning
- Departmental Action Planning
- Strategic Plan Documentation
- Annual Business Review Design
- Strategy Execution Reviews

A strategic plan should not merely tell an organization:
“Where are we going?”

It should ultimately answer:
Where are we now?
Why are we here?

What is changing around us?
What matters most?
What must change internally?
What will we accomplish?
How will we measure it?
What will we do?
Who owns it?
And how will leadership know whether execution is actually happening?

That is when strategic planning begins moving from **a workshop** to **a management system**.