



Strategy vs. Planning



Resources

From All 3 Presenters

Can be found at The Exchange

➤ **Documents**

➤ **Business Planning Resources**

Plus a new Forum Discussion for this session:

➤ **Brass Tacks for Business Planning**

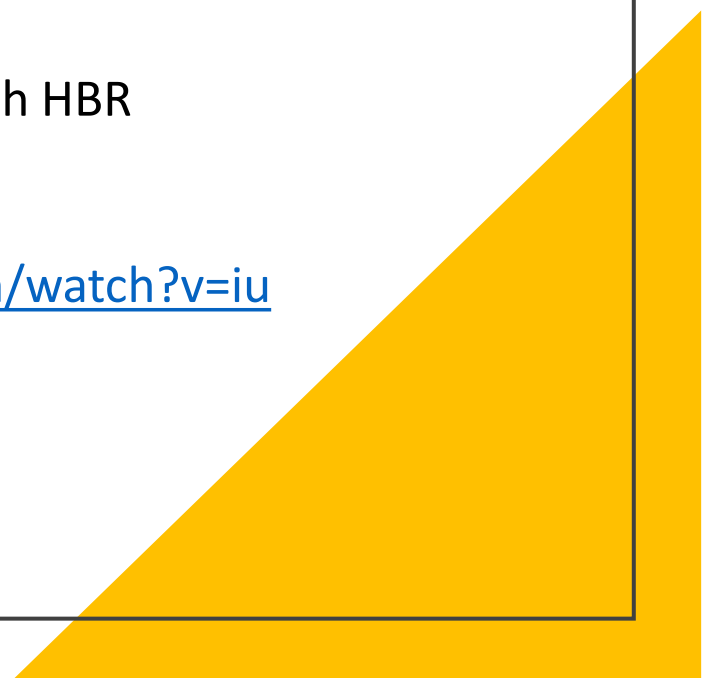


My Source

A Plan is Not a Strategy

- Roger Martin
- Professor Emeritus at University of Toronto, Rotman School of Management
- His Presentation, through HBR

<https://www.youtube.com/watch?v=iuYIGRnC7J8>





Strategy is A Way of Winning

If you want to
scale your
business

If you want to
dominate in a
niche



“Strategic Planning”

- An oxymoron
 - Planning by its nature is not strategic
 - Strategy drives everything, including your plans
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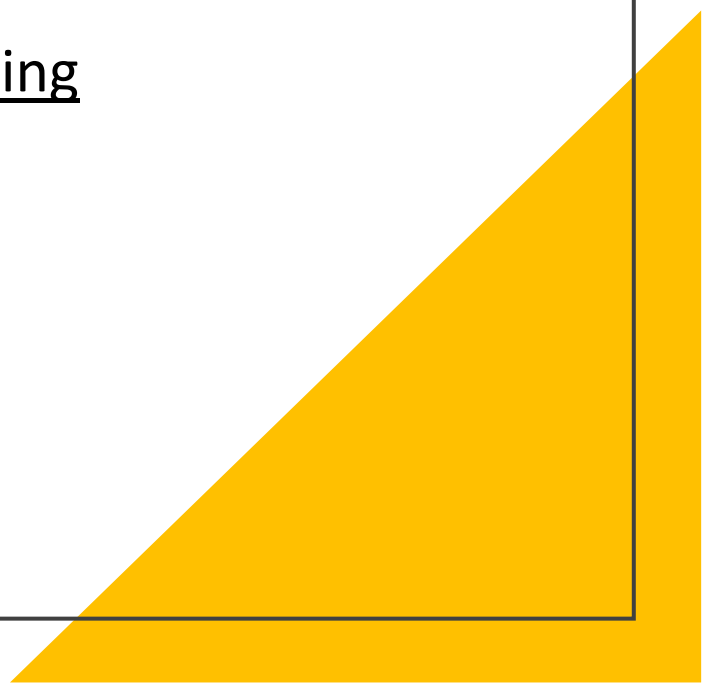


Planning

- A Set of activities that you want to do
- It is focused on how you will spend your resources
- It is comfortable and within your current “system of thought”
- The results may not make you happy if you don’t have a strategy



Strategy

- “An integrative set of choices that position you on a playing field of your choice in a way that you win.”
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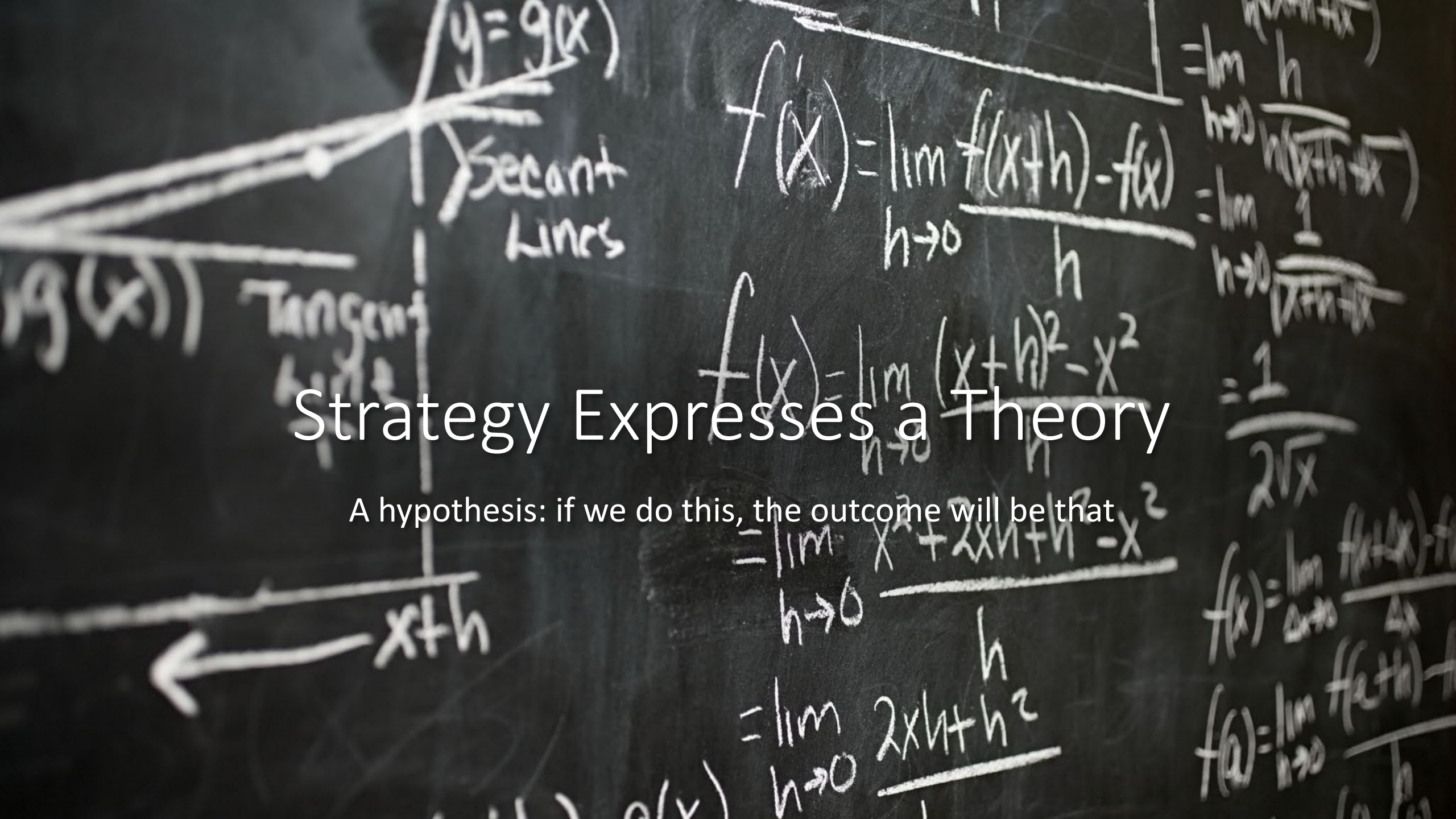


About Strategy

- It is going after an outcome
 - It's investment, not expense
 - It involves risk, it's not comfortable
 - Must be coherent and doable
-

Strategy Expresses a Theory

A hypothesis: if we do this, the outcome will be that





Examples

- Southwest Airlines
- Strategy: compete with Greyhound for people's travel dollars
- Theory: if we do these things, we will win on this playing field
 - Focus on point to point travel
 - Use only one type of plane
 - Short flights, no meals
 - Go after an unserved target market




Apple, Steve Jobs

- Goal "put an incredibly great computer in a book that you can carry around with you and learn how to use in 20 minutes"



Salesforce

- **Software-as-a-Service (SaaS)**
Model: Salesforce aimed to deliver business software applications over the internet, eliminating the need for complex and costly installations. This approach was inspired by the simplicity and accessibility of consumer websites like Amazon
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A large yellow right-angled triangle is positioned in the bottom right corner of the slide, extending from the bottom edge towards the right edge.

Salesforce Strategy

- implemented a strategy called V2MOM (Vision, Values, Methods, Obstacles, and Measures). This framework helped align the organization around common goals and provided a clear vision for employee



Alice Heiman

- Decided to focus on CEOs who are responsible for sales
- Her theory: they would respond to a podcast “Sales Talk for CEOs”
- Alice is on her way to dominate that market: SMB CEOs who need help with sales
- Her podcast allows her to invite them, engage them, work for them



Brynne Tillman – askSSL

- **askSSL is your personal AI prompt platform**
- We built askSSL because we know LinkedIn and AI are game-changers... *when they're done right.*
- askSSL is not just a tool; it's your shortcut to smarter, more personalized, and authentic, trust-based sales conversations.
- [askSSL](#)



What's In This for You?

- Do you want to scale
- Are you thinking 10X about your life and business
- Do you want to think differently about “your niche” or your ICP?
- If so,



Define the playing field
on which you can win!

