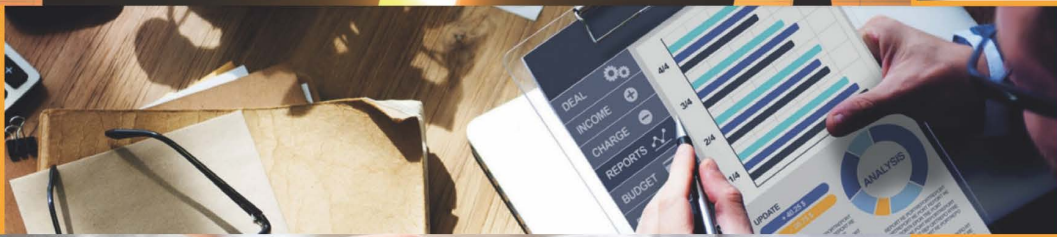


# THE ROBBINEX<sup>®</sup>

# 10/5/3

## Strategic Planning Workbook



## The Robbinex® 10-5-3 Program™

This is a **10** year vision, a **5** year goal and a **3** year detailed business plan. It is an annual business valuation that's updated every year. It allows you to be able to recognize opportunities and be prepared to take the appropriate actions.

### Tools Needed

<b>Time</b>	• About 20-40 hours per year
<b>Financial Records</b>	• Usually the past 3 years
<b>Access to Research</b>	• Usually done in advance
<b>Easel Paper</b>	• Marking pens & masking tape
<b>Dedicated Room</b>	• 2-5 days
<b>Laptop &amp; Printer</b>	• And other sundries

### The Doodlebook Has Three Parts



## Personal

Looking back 10 years... What were you doing?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Looking back 10 years... What were your goals?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Looking back 10 years... List 4 major personal accomplishments achieved.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Looking back 10 years... Which of your 4 major personal accomplishments were forecasted?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

What would you like to see yourself accomplishing during the next 10 years?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Some things to consider:

Age	Retirement @ What Age	Job Function	Education	Conferences Per Year
Community Activities	Home	Vacation Home	Time Off.... Vacations	Other Activities
Net Worth - Business	Net Worth - RRSP's/401k's	Net Worth - Personal Residence	Net Worth - Investments	When Is Enough, Enough!



**Prioritized them! Which can be done in one year, three years, five years and ten years?**

**1<sup>st</sup>**

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**3<sup>rd</sup>**

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**5<sup>th</sup>**

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**10<sup>th</sup>**

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**What activities would you like to see yourself doing after you retire?**

**1.**

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**2.**

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**3.**

---

**4.**

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**What preparation have you done/will you need to do to be able to do the activities you would like to do when you retire?**

**1.**

---

**2.**

---

**3.**

---

**4.**

---

## Business / Personal

What would you like to see your business do for you and your family during:

This Year?

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In 3 Years?

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---

In 5 Years?

---

---

In 10 Years?

---

---

## Business

Looking back 10 years... What were you doing?

1. 

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2. 

---
3. 

---
4. 

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**Looking back 10 years... What were your goals?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Looking back 10 years... List four major business accomplishments achieved.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Looking back 10 years... Which of your 4 major business accomplishments were forecasted (thought about/dreamed of) more than 5 years before?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

What major achievements would you like to see your business accomplish during the next 10 years?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### Things to Consider:

Revenue Generators	New Facilities / Locations	New Members of Management Team	Acquisition of Equipment	Other Areas for Improvements
<ul style="list-style-type: none"> <li>•Marketing Plans</li> <li>•Sales Activities</li> <li>•Advertising Programs</li> <li>•Sales Teams</li> <li>•Training Programs</li> <li>•New Sales Persons</li> <li>•New Territories</li> </ul>	<ul style="list-style-type: none"> <li>•Type</li> <li>•When</li> <li>•How Financed                             <ul style="list-style-type: none"> <li>•Loans</li> <li>•Leasing</li> <li>•Internal</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>•Job Function</li> <li>•When</li> <li>•Salary Range</li> </ul>	<ul style="list-style-type: none"> <li>•Type</li> <li>•When</li> <li>•How Financed                             <ul style="list-style-type: none"> <li>•Loans</li> <li>•Leasing</li> <li>•Internal</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>•P&amp;L Margins</li> <li>•Other Costs</li> </ul>

# of Locations	# of Employees	Products	Services	Facilities	Equipment	Suppliers / Vendors
Customers	Location/ Community	Capital Requirements	Sources of Capital	Major Equipment Purchases	Employees Training	New Employees - Skills?
	Facilities / Location	Acquisitions?	Profit as a Percentage of Sales	Ideal Revenue	Profits	



**What would you like to see your business accomplish during the next 5 years?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**What would you like to see your business accomplish during the next 3 years?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**What would you like to see your business accomplish during the next year?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## Summarizing the Visions...

Year	1	2	3	4	5	10
Revenue						
Family Wages						
Profits						
# of Locations						
Product Lines						
Facility Size						
# of Employees						
Customer Base						
Intergenerational Transfer						
Acquisition						

Determine some of the goals that should be accomplished if you are to have any hope of achieving your vision:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_

**What is needed to accomplish goal #1?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #2?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #3?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #4?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #5?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #6?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #7?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #8?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**What is needed to accomplish goal #9?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_



Now, prioritize them:

Goal #1	By when?	Goal #2	By when?	Goal #3	By when?
Goal #4	By when?	Goal #5	By when?	Goal #6	By when?
Goal #7	By when?	Goal #8	By when?	Goal #9	By when?

## The Next Step!

Convert various goals and project into numbers.

**Capital Costs**

**Financing  
Costs**

**Operating  
Expenses**

**Timing**

## Open up a Financial Spreadsheet

### Cost Each Goal

- Both capital cost and operating costs

### Insert Into a 5 Year Business Plan

- Major headings only, by year

### Insert Into a 3 Year Business Plan

- Major segments only, by quarter

### Insert Into a Detailed One Year Business Plan

- All headings line by line, month by month

## The Most Important Steps!

**Review the Budget Quarterly,  
Comparing Actual to Forecast**



**Adjust Where Necessary**



**Repeat the Entire Process  
Annually**