

Integrated company planning checklist

Assigned to:

Completion date:

1 Analysing and appraising the situation

- 1.1 Political
- 1.2 Economic
- 1.3 Social
- 1.4 Technological

_____ [] _____ []

2 Setting objectives

- 2.1 Financial objectives
- 2.2 Customer objectives
- 2.3 Operational objectives
- 2.4 HRM objectives

_____ [] _____ []

3 Assembling possible market strategies

- 3.1 Product
- 3.2 Price
- 3.3 Place
- 3.4 Promotion
- 3.5 People
- 3.6 Process
- 3.7 Perishability
- 3.8 Physical evidence

_____ [] _____ []

4 Choosing the most favourable strategy:

- 4.1 Existing products - existing markets
- 4.2 New products - existing markets
- 4.3 Existing products - new markets
- 4.4 New products - new markets

_____ [] _____ []

5 Developing individual activity plans:

- 5.1 Sales Plan
- 5.2 Product development plan
- 5.3 Production plan
- 5.4 Manpower plan
- 5.5 Acquisitions plan
- 5.6 Organisation plan
- 5.7 Financing plan

_____ [] _____ []

Integrated company planning checklist (continued)

	Assigned to:	Completion date:
6 Checking the individual activity plans against the financial plan:	_____ []	_____ []
6.1 Profitability estimates	_____	_____
6.2 Capital requirement estimates	_____	_____
6.3 Return on capital/risk assessments	_____	_____
7 Integrating the individual plans with each other and adjusting to focus on synergies	_____ []	_____ []
7.1 Correlation of underlying assumptions of sales forecasts with each plan	_____	_____
7.2 correlation of resource allocations within each plan	_____	_____
7.3 Correlation of key inputs/outputs of each plan	_____	_____
8 Working out policies and processes	_____ []	_____ []
8.1 Strategy - setting direction to all operating units	_____	_____
8.2 Structure - defining power and clarifying decision making roles	_____	_____
8.3 People - defining the skills and the mindset required by people in the organisation	_____	_____
8.4 Rewards - linking the reward systems to motivate staff to achieve corporate targets	_____	_____
8.5 Processes - getting the right info to the right people	_____	_____
9 Budgeting	_____ []	_____ []
9.1 Capital budgeting	_____	_____
9.2 Operational budgeting	_____	_____
10 Comparing plan with actual	_____ []	_____ []
10 Sales Plan - volumes, sales mix, customer growth, customer distribution	_____	_____
10 Product development plan - timeframes, deliverables,	_____	_____
10 Production plan - inventories of raw materials, w.i.p, finished goods	_____	_____
10 Manpower plan - recruitment, induction and training deliverables	_____	_____
11 Acquisitions plan - lead generation, lead shortlisting, bids, acquisitions, transitions	_____	_____
11 Organisation plan - strategy/structure fit - review of departmentalised	_____	_____
11 Financing plan - own funds, equity financing, debt financing	_____	_____