



adapted from “Field Guide to Consulting and Organizational Development” – to obtain the entire book, select “Publications” at <http://www.authenticityconsulting.com>

Typical Types of Systematic Plans in Businesses

It’s important that all systems in an organization operate in a systematic manner – that they are designed with clear goals and with means to assess the progress toward those goals. The following plans are some examples of common systematic plans in business organizations.

Advertising and Promotions Plan (per product or service)

- Target group(s) served by the product?
- Product’s benefits to each target?
- How to convey benefits to each target?
- Who conveys benefits and when?
- How to convey the benefits?
- What resources do they need?
- Costs to get and use those resources?
- How will we evaluate the effectiveness of the Advertising and Promotions Plan?

Board Development Plan

- Results of Board assessment?
- Areas that need improvement?
- Action plans to address each area?
- Who conducts each action and when?
- Schedule for re-assessment?
- What resources do they need?
- Costs to get and use those resources?
- How will we evaluate the effectiveness of the Board Development Plan?

Evaluation Plan

- Audience for evaluation results?
- Decisions that evaluation helps to make?
- What information is needed?
- How to get that information and when?
- Who gets that information?
- How to analyze and report information?
- How will we evaluate the effective of the Evaluation Plan?

Business Plan (per product or service)

- Description of product or service?
- Marketing plans:
 - What specific market need(s) exist?
 - What outcomes and benefits needed?
 - What target markets served?
 - What products/services provided?
 - Potential competitors and collaborators?
 - How to provide (“package”) services?
 - Pricing structure(s)
- Management and staffing plan:
 - What expertise (people) is needed?
 - How is expertise organized?
 - Who leads the expertise?
- Financial:
 - Estimated revenues?
 - Estimated expenses (to operate)?
 - Estimated break-even?
- How will we evaluate the effectiveness of the Business Plan?

Public Relations (per organization)

- Desired public image for organization?
- Convey image to which stakeholders?
- Convey what message to each stakeholder?
- Who conveys it and when?
- How to convey it?
- What resources do they need?
- Costs to obtain and use resources?
- How will we evaluate the effectiveness of the Public Relations Plan?

Strategic Plan (for entire organization)

- Mission, vision, values
- Critical issues
- Goals and strategies
- Action plans
- Budgets
- How will we evaluate the effectiveness of the Strategic Plan?