

Annual Strategic Execution Preparation

Program Management Plan

(Cloud-Based)

"Succinct, Rapid, Fluid"





First Dynamic Business Solutions, Inc.
18332 Gramercy Drive
North Tustin, CA 92705
(714) 768-2815
LeeG@BusinessSolutionsOC.com
www.BusinessSolutionsOC.com

Prospective Client,

Thank you for your interest in an Annual Leadership Strategic Execution Plan Program. In 2020, more than any other time, we were subject to more changes that were out of our control but require collaborative input to make the best decisions. Without question, the most important meeting a company can conduct during this period of constant change, is their Annual Strategic Performance Review.

This meeting not only provides your Leadership Team with the opportunity to recap some of the most significant strategic accomplishments of the year but also some of the most critical challenges that have been addressed.

Many Leadership Teams have experience this as the ideal opportunity to further strengthen the synergy and cohesiveness among their Teams. This becomes a natural byproduct of your facilitated collaborative discussion on key issues.

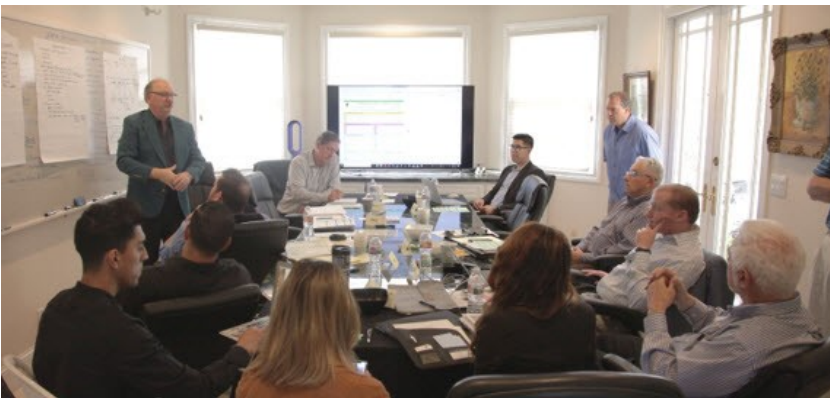
Perhaps one of the most critical keys to the continued future strategic success of your Plan is the clarity of focus and its format infrastructure to deliver a Working Rapid Strategic Execution Plan document that strategically moves your business through 2021.

By incorporating a unique Cloud-Based, Real-Time Execution Support System clients experience an innovative, value-added execution assurance component. We're here to help.

In the Spirit of Continuous Growth and Learning,

A handwritten signature in blue ink, appearing to read "Lee Greytak", is positioned above the printed name.

Lee Greytak
CEO
First Dynamic Business Solutions, Inc.



DEALING WITH CHANGE IN OUR BUSINESSES... “SO, WHAT’S YOUR PLAN?”

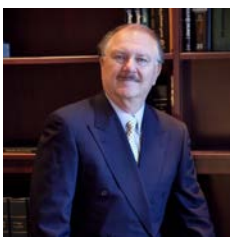
Our Mission: To provide a highly-organized think-tank environment to discuss relevant strategies, ideas and suggestions to manage and grow your business in 2021.

- **Rapid Strategic Execution Made Simple**
- **Safe Meetings Using Zoom**
- **A Unique Infrastructure Format.**
- **A Hard-Copy, “Real-World” Working Strategic Execution Business Plan.**
- **Cloud Base Updates.**
- **In-Depth Review Sessions to Rapidly Incorporate Shifts & Changes in Your Industry & Market.**

Working Strategic Execution Plan
A Unique Format
ZOOM Meetings

Annual Strategic Goals
Strategic Execution Plan
Collaborative Team Input
Cloud-Based, Real-Time Updates
Safe - Zoom Meetings

Lee Greytak
(714) 768-2815
LeeG@BusinessSolutionsOC.com



Lee Greytak CEO
 First Dynamic Business Solutions, Inc.
 LeeG@1stDynamic.com

A Unique Concept...

- ◆ So much more than just another Mission, Vision, SWOT discussion..
- ◆ Working Strategic Execution Plan that Focus on Results.
- ◆ Prioritize, Next Action Steps, Move Forward Format Through 2021.

Your Annual Strategic Planning Program Overview

Our Mission: *To provide a highly organized think-tank environment to discuss directly relevant strategies, ideas, and suggestions to help further manage and Grow Your Business in 2021.*

The Program: Our unique Annual Planning Program format has been developed and fine tuned across a broad range of business environments over the past 26 years. As a result, it provides an unparalleled level of practical "Take-Away" value for your entire Executive Team. Each Program is customize designed to address the top "Deliverables" as defined and detailed by the Client during the preparation and staging phase of their Program.

- * Strategic Planning is great, but... Rapid Strategic Execution is vital to the future growth and success of every organization. It's for this very reason that your Rapid Strategic Execution infrastructure is designed and setup during the upfront preparation phase of every Program.
- * Annual Planning participation can become a Game-Changer... since teamwork is such an essential component of every Plan's rapid execution. The more key team-members involved in the Program the greater the "Pride of Ownership" that takes place. It's no longer just the Boss's Plan but rather Our Plan and they have a vested interest in the Plan's execution and success.
- * The majority of the time is focused on small team discussions regarding key components of the Plan. This provides detailed input and collaboration during the planning process and helps to foster a "pride of plan ownership" as a by-product.

We take our responsibility to our selected Interns and The Program very seriously. They are taught career skills and a professional mindset from the moment they enter The Program. Throughout The Program they work hand-in-hand with seasoned business owners and financial officers from a broad range of industries.

- * Extensive Strategic Analysis of Current Critical Issues and Challenges takes place both prior to the Retreat as well as a key opening small team discussion to demonstrate the awareness of obstacles that may compromise Rapid Strategic Execution. By demonstrating the organization's commitment to understanding the team's concerns goes a long way to demonstrating an execution focused mindset.
- * Our format incorporates an extensive Internship Support Team to assist during the Program so that our Clients can stay focused on strategic topic discussions while seeing all the data input and captured in real-time.
 - * The entire Program is set-up and organized on a Google Cloud template enabling real time strategic coordination throughout the preparation of the Plan Development and Plan Execution phases.

At the completion of your Program, you will receive a hard copy "Preliminary Draft" of your Working Strategic Execution Plan for follow-up review at the conclusion of the Program.

Key Elements of The Program

- * A Real-World, "Working" Strategic Business Execution Plan - Updated Monthly
- * 1-Page Strategic Metrics, Goals, Objectives & Priorities - Evaluated, Updated Quarterly
 - * Current Critical Issues Analysis - Evaluated, Updated Quarterly
- * Rapid Strategic Execution as Your Competitive Advantage and Much, Much More...

Strategic Planning - History To Date

Company: _____

Date: 10/22/2020

CEO / Owner: _____

Tenure: _____

Contact: _____

Position: _____

Business: _____

Founded: _____

Product / Service: _____

Employees: _____

Location: _____

Leadership Team: _____

Position: _____

1	Does your organization currently have any type of written Strategic (Business, Marketing, Sales) Plan?																								
2	When was the last time you conducted any type of Management Planning Program? (1/2, 1, 2 Days)																								
3	Have you used any type of outside consultant or executive coaching to date? (Explain)																								
4	How do you go about establishing your Annual Goals, Objectives, Budgets, Initiatives etc.?																								
5	Who is typically involved in the development of the Annual Goals, Objectives, Budgets etc.?																								
6	How do you review and evaluate on the Execution of your Annual Goals and Objectives?																								
7	What is your primary Sales / Marketing Strategy?																								
8	Ideally what would you like to accomplish with your upcoming Strategic Planning Program?																								
9	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;"></th> <th style="width: 20%; text-align: center;">2020</th> <th style="width: 20%; text-align: center;">2019</th> <th style="width: 20%; text-align: center;">2018</th> </tr> </thead> <tbody> <tr> <td>Revenue</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>CGS</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>GP</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>G&A</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>Net Inc</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table>		2020	2019	2018	Revenue	_____	_____	_____	CGS	_____	_____	_____	GP	_____	_____	_____	G&A	_____	_____	_____	Net Inc	_____	_____	_____
	2020	2019	2018																						
Revenue	_____	_____	_____																						
CGS	_____	_____	_____																						
GP	_____	_____	_____																						
G&A	_____	_____	_____																						
Net Inc	_____	_____	_____																						



Client:

Date:

11/5/2020

Pre-Program Staging Checklist (via Zoom)

No.	Follow Up Action Items	Lead	Current Target	Status	Wingman	Date Listed
1	Strategic Due Diligence Report	Client		100%		11/5/2020
2	Targeted Program Dates	Client		100%		11/5/2020
3	Program Dates Confirmed / Agreement	Lee		100%		11/5/2020
4	"Hold The Date" Internal Program Announcement	Client		100%		11/5/2020
5	Company Background History Past Strategic Planning Material	Lee		100%		11/5/2020
6	Company Logo	Client		100%		11/5/2020
7	Organizational Chart	Client		100%		11/5/2020
8	Program Attendee List	Client		100%		11/5/2020
9	Client Lead / Core Team Established	Client		100%		11/5/2020
10	Current Critical Issues Assessment	Client		100%		11/5/2020
11	Program Development Timeline Set Up	Lee		100%		11/5/2020
12	Top 5 Key Performance Metrics (KPI) (Past 3 Years)	Lee		100%		11/5/2020
13	Targeted Strategic Goals, Objectives, Out-Comes	Lee		100%		11/5/2020
14	Annual Strategic Goals Objectives, Mission, Vision - Updates	Lee		100%		11/5/2020
15	Client Program Cloud Set-Up, Access, Test	Lee		100%		11/5/2020
16	Preliminary Draft Agenda Sent Out	Lee		100%		11/5/2020
17	Past Staff Meeting Summary Reports - Reviewed	Lee		100%		11/5/2020
18	"Rapid Execution System" Format	Lee		100%		11/5/2020
19	Zoom Meeting Documents	Lee		100%		11/5/2020
20	Pre-Program Homework Instructions, Assignments, EM, Reviewed	Lee		100%		11/5/2020
21	"Execution Tracking System" Format	Lee		100%		11/5/2020
22	Program Meeting - Executive Opening Comments	Client		100%		11/5/2020
23	Program Discussion Worksheets	Lee		100%		11/5/2020
24	Program Discussion, Format, Topics, Out-Briefs	Lee		100%		11/5/2020
25	Staff Meeting Audit	NA		100%		11/5/2020
26	OPS Team - Roles Discussion Meeting	Lee		100%		11/5/2020
27	Core Team Follow Up Schedule (CTFS)	Lee		100%		11/5/2020
28	Monthly Program Performance Review Process	Lee		100%		11/5/2020
29	Program OPS Team Preparation Set-Up	Lee		100%		11/5/2020
30	Zoom Meeting Testing Set Up	Lee		100%		11/5/2020
31	Program SEP Out-Brief Report	Lee		100%		11/5/2020
32	Monthly Executions Progress Review	Lee		100%		11/5/2020
33	Monthly Execution Tracking System (ETS) Report	Lee		100%		11/5/2020
34						

2020 Recap - Major Strategic Accomplishments (MSA)

Name: _____

Date: _____

No:	Strategic Accomplishment	Month	Department / Function
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			
12			
13			
14			
15			

2021 Future Major Strategic Accomplishments (FMSA)

Name: _____

Date: _____

No:	Strategic Accomplishment	Month	Department / Function
01			
02			
03			
04			
05			
06			
07			
08			
09			
10			
11			
12			
13			
14			
15			

Current Critical Issues List (CCI)

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"Necessity... The Mother of Invention"

Date: _____

No:	CRITICAL ISSUE / PROBLEM	"A" Priority	Lead	Critical Date	Status	Listed
01						
02						
03						
04						
05						
06						
07						
08						
09						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
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21						
22						
23						
24						
25						
26						
27						
28						
29						
30						

Annual Retreat Agenda

Client Name

Kaizen

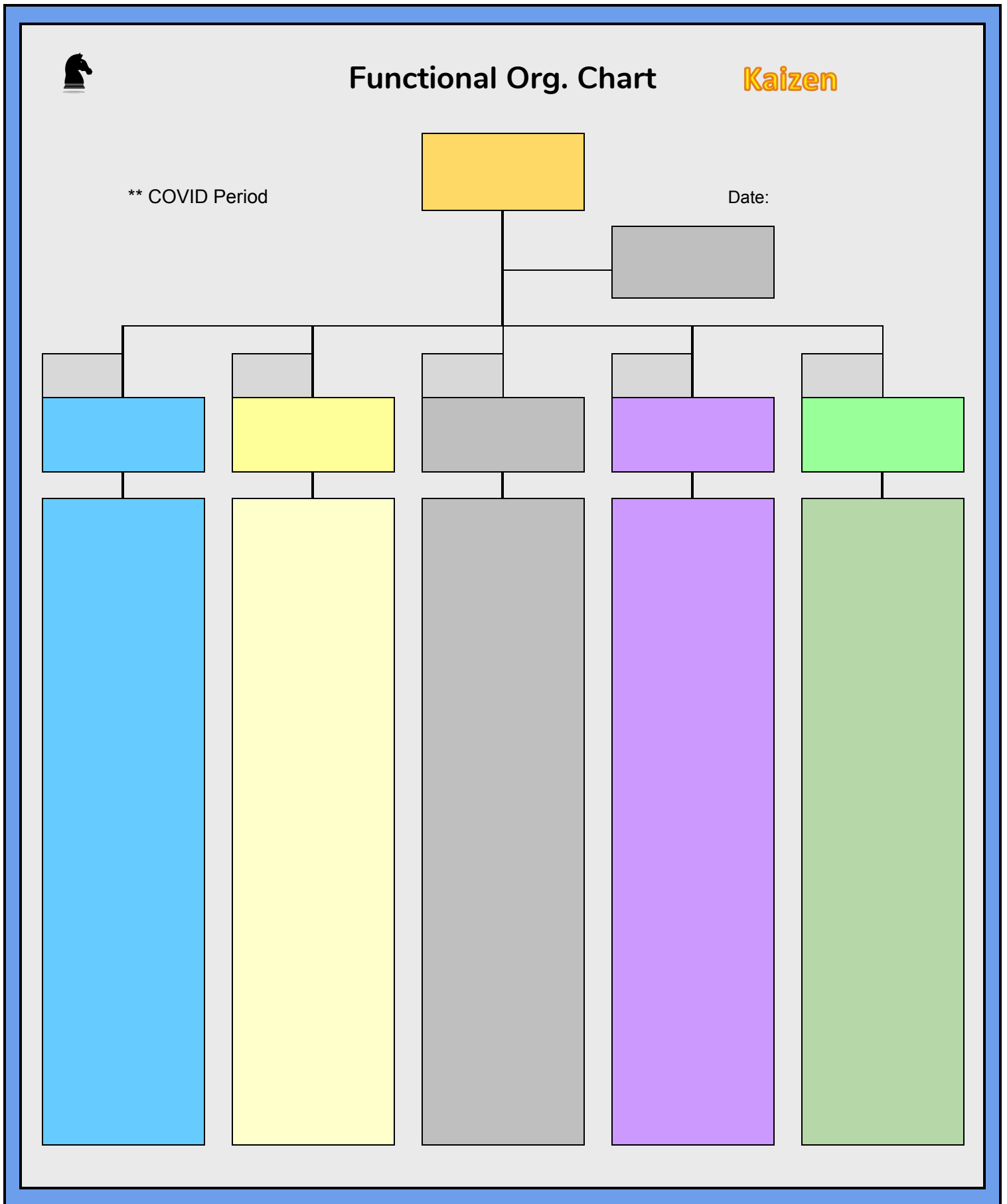
Month XX 2020 - _____, CA

Phase-I Pre-Retreat Pre-Work Package

- **Agenda Overview** **Lee, OPS**
- **2020 Recap - Major Strategic Accomplishments (MSA)** **Member, Intern**
- **2021 - Current Critical Issues List (CCI)** **Member, Intern**
- **2021 - Key Events Calendar (KEC)** **Member, Intern**
- **Submit as soon as ready for 2021 SEP Set-Up** **Member, Intern**

Agenda

- 9:00 **Opening Comments, Agenda** **Lee**
- **2020 Recap - Major Strategic Accomplishments (MSA)** **Member, Team, Intern**
 - **2021 - Current Critical Issues List (CCI)** **Member, Team, Intern**
 - **2021 - Key Events Calendar (KEC)** **Member, Team, Intern**
 - **2021 - Tactical implementation Plan (TIP)** **Member, Team, Intern**
 - **2021 - Functional Organizational Chart (FOC)** **Member, Team, Intern**
 - **2021 - Key Processes Innovation Analysis (KPIA)** **Member, Team, Intern**
 - **2021 - Future Major Strategic Accomplishments (FMSA)** **Member, Team, Intern**
 - **2021 - Rapid Execution Accountability System (REAS)** **Member, Team, Intern**
 - **2021 - Strategic Goals, Objectives, Priorities (SGOP)** **Member, Team, Intern**
 - **2021 - Key Process Innovation Analysis (KPIA)** **Member, Team, Intern**
 - **2021 - Strategy Action Plans (SAP) - Top Priorities** **Member, Team, Intern**
 - **Group Photo** **Member, Team, Intern**
 - **Forward Updated SEP Reports Out to All** **Lee**
- 4:00 **Retreat Review, Closing Comments, Adjourn Retreat** **Lee**



Past Year Summary / Moving Forward

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*"Because...The Most Focused, Most Organized, Most Prepared...
Will Consistently PREVAIL!" Sun Tzu (The Art of War)*

A. Top-4 Metrics Goals for This Year "A" Priorities					
No.	Metrics	2020	2021	2022	2019
1					
2					
3					
4					
B. Priority Follow-Up Actions					
1		4			
2		5			
3		6			
C. Top 3 Past Major Strategic Accomplishments:					
1					
2					
3					
D. Top 3 Critical Issues:					
1					
2					
3					
E. Top 3 Upcoming Key Events					
No.	Follow-Up Actions	Lead	Wingman	Tgt. Date	Progress
1					
2					
3					
F. Top 3 90 Day Major Strategic Priorities:					
No.	Strategic Priority	Lead	Wingman	Target Date	Progress
1					
2					
3					

Strategy Action Plan - Proposed

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Topic: _____

Date: _____

Team: A Lead:

Wingman:

Team-Mates:

A. Strategic Objectives / Goals:		Initial Draft:	
1.			
2.			
3.			
B. Additional Critical Issues / Challenges:		D. Key Elements; (Show Me)	
1.		1.	
2.		2.	
3.		3.	
C. The Ideal Game Plan:			
1.		7.	
2.		8.	
3.		9.	
4.		10.	
5.		11.	
6.		12.	
D. Follow-Up Actions:		Lead	Wingman
1.			
2.			
3.			
4.			
5.			
6.			

Strategic Planning Team / Follow Up Schedule

Date:

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A. Leadership Team:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

B. Core-Team:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

B. SP OPS Team (OPS):

- | | |
|----------------------|----------|
| 1. Rene Rojano | T,W,F |
| 2. Caleb Sachs | M-F |
| 3. Thomas Park | M-F |
| 4. Brandon Kessler | M-F |
| 5. Maxwell Boscardin | M-F |
| 6. Jennifer Icaro | M,W,F |
| 7. Maria Macias | T,Th,F |
| 8. Leon Phung | M,T,Th,F |
| 9. Salim Tarzi | M,Th |
| 10. Evan Carol | T,Th,F |

C. 2020 Meeting Schedule:

All Dates Subject to Change

Details

#	Date	Meeting	Details
1		Annual Strategic Planning Program	8:00 AM
2	Jan TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
3	Jan TBD, 2021	Monthly Performance Review - Leadership Team	TBD
4	Feb TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
5	Feb TBD, 2021	Monthly Performance Review - Leadership Team	TBD
6	Mar TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
7	Mar TBD, 2021	Monthly Performance Review - Leadership Team	TBD
8	Apr TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
9	Apr TBD, 2021	Monthly Performance Review - Leadership Team	TBD
10	May TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
11	May TBD, 2021	Monthly Performance Review - Leadership Team	TBD
12	Jun TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
13	Jun TBD, 2021	Monthly Performance Review - Leadership Team	TBD
14	Jul TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
15	Jul TBD, 2021	Monthly Performance Review - Leadership Team	TBD
16	Aug TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
17	Aug TBD, 2021	Monthly Performance Review - Leadership Team	TBD
18	Sep TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
19	Sep TBD, 2021	Monthly Performance Review - Leadership Team	TBD
20	Oct TBD, 2021	Core-Team Monthly Plan Execution Review	TBD
21	Oct TBD, 2021	Monthly Performance Review - Leadership Team	TBD

Rapid Execution Accountability System

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Master - Month Of: December 2020

Date:

A. Top-3 Strategic "A" Priorities					
No.	Strategic Priority	Lead	Wingman	Tgt. Date	Progress
A1.					
A2.					
A3.					
B. Priority Follow-Up Actions					
No.	Follow-Up Actions	Lead	Wingman	Tgt. Date	Progress
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
C. Important Meetings, Calls, Appointments, Emails (See Calendar, Pre-Prep)					
1					
D. Top-2 Most Significant Accomplishments Since Last Meeting					
#1.		6.			
#2.		7.			
3.		8.			
4.		9.			
5.		10.			

Rapid Execution Accountability System

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Master - Month Of: January 2021

Date:

A. Top-3 Strategic "A" Priorities					
No.	Strategic Priority	Lead	Wingman	Tgt. Date	Progress
A1.					
A2.					
A3.					
B. Priority Follow-Up Actions					
No.	Follow-Up Actions	Lead	Wingman	Tgt. Date	Progress
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
C. Important Meetings, Calls, Appointments, Emails (See Calendar, Pre-Prep)					
1					
D. Top-2 Most Significant Accomplishments Since Last Meeting					
#1.		6.			
#2.		7.			
3.		8.			
4.		9.			
5.		10.			



Strategic Goals, Objectives, Priorities

Client Name

Kaizen

1. Our Mission:

Date:

To Definitively establish in precise terms the strategic identity (Brand), Image and Reputation of our company, our products and our services such that in the mind of our largest marketplace there could be no possible alternative available anywhere regardless of price.

2. Branding - Competitive Advantage:

Next Quarterly Review: 5/1/2021

The Most Focused, Most Organized, Most Prepared...Consistently Prevails! - Sun Tzu (The Art of War - 500 BC)

3. Strategic Introduction:

Name, Position, Company, Location, Years with the Company, Years in the Industry

4. Metrics:		<u>2019</u>	<u>2020</u>	<u>2021</u>	<u>2022</u>
1.					
2.					
3.				(See Confidential Report)	
4.					
5.					
5. Future Major Strategic Accomplishments (MSA):		<u>Lead</u>	<u>Wingman</u>	<u>Critical Date</u>	<u>Progress</u>
1.					
2.					
3.					
4.					
6. Current Critical Issues (CCI):		<u>Lead</u>	<u>Wingman</u>	<u>Critical Date</u>	<u>Progress</u>
1.					
2.					
3.					
4.					
7. Upcoming Key Events (UKE):		<u>Date</u>	<u>Location</u>	<u>Lead</u>	<u>Wingman</u>
1.	Event				
2.					
3.					
4.					



2021 - Key Process Innovation Analysis (KPIA)

Kaizen

Date: 11/2/2020

No:	Process	Priority	Lead / Wingman	Next Steps	Progress	Comments
1						
2						
3						
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17						
18						
19						
20						

KAIZEN
"The Relentless Pursuit of
Continuous Innovation and
Improvement"

CONFIDENTIAL

Client Name
City, CA

2021 "Working"
Strategic Execution Plan

Rapid Military Execution of Your Business Strategy...
"When Your Strategies and Plans Just Can't Afford to Fail!"

Monthly Update
January 2021

"Succinct, Rapid, Fluid"

So What's The PLAN? Don't Tell Me... Show Me!

(Cloud-Based)

Revision: 01/xx/2021

Phase I

Strategic Execution Coordination

Lee Greytak
LeeG@1stDynamic.com
(714) 768-2815



(SEP)

KAIZEN
"The Relentless Pursuit of
Continuous Innovation and
Improvement"

CONFIDENTIAL

Lee Greytak
First Dynamic Business Solutions, Inc.
Orange County, CA

**2020 "Working" Strategic
Business Execution Plan**

*A Highly Organized, Succinct System for Working
ON Your Business Rather Than Just IN Your Business!*

"Monthly Progress Report"

November 2020

"Rapid, Fluid, Succinct"

"Growing Your Business... So What's Your PLAN?"

(Cloud-Based)

Revision: 11/06/2020

Phase IV

The Peer Advisory Forum

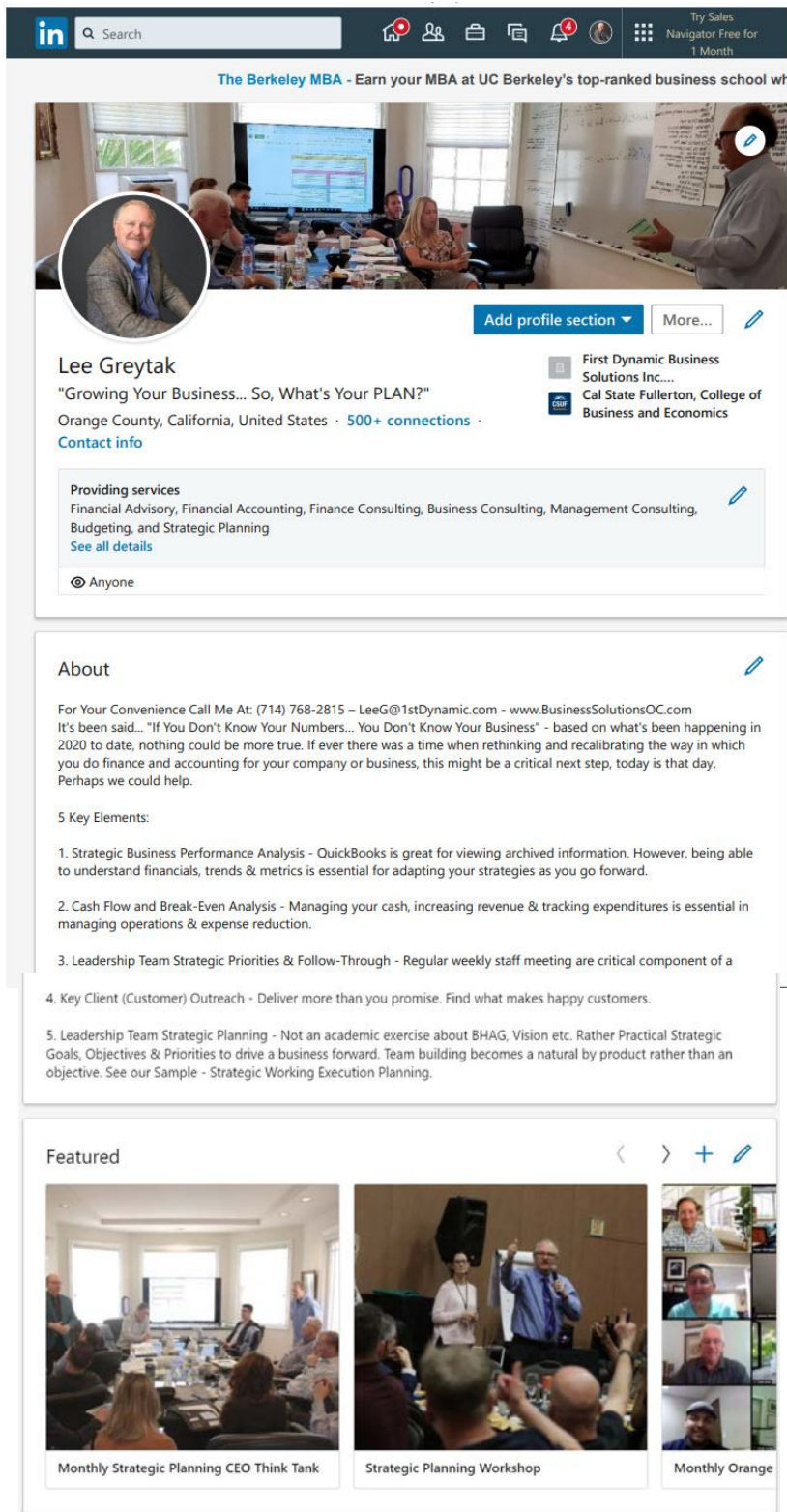
Dr. Pete Johnson

Pete@StrategicPlanning.com

(949) 233-5566

(WIFI Code: PJHome3113)





The image shows a LinkedIn profile for Lee Greytak. At the top, there is a navigation bar with the LinkedIn logo, a search bar, and various utility icons. Below this is a banner for 'The Berkeley MBA' with a photo of a classroom. The profile header includes a circular profile picture of Lee Greytak, his name, and a tagline: "Growing Your Business... So, What's Your PLAN?". It also lists his location as Orange County, California, and his current employer as First Dynamic Business Solutions Inc., along with his affiliation with Cal State Fullerton. A 'Providing services' section lists 'Financial Advisory, Financial Accounting, Finance Consulting, Business Consulting, Management Consulting, Budgeting, and Strategic Planning'. The 'About' section contains a paragraph about business challenges in 2020 and a list of five key elements: Strategic Business Performance Analysis, Cash Flow and Break-Even Analysis, Leadership Team Strategic Priorities & Follow-Through, Key Client (Customer) Outreach, and Leadership Team Strategic Planning. The 'Featured' section at the bottom displays three images: a 'Monthly Strategic Planning CEO Think Tank', a 'Strategic Planning Workshop', and a 'Monthly Orange' video call grid.

Lee Greytak
"Growing Your Business... So, What's Your PLAN?"
Orange County, California, United States · 500+ connections · [Contact info](#)

Providing services
Financial Advisory, Financial Accounting, Finance Consulting, Business Consulting, Management Consulting, Budgeting, and Strategic Planning
[See all details](#)

Anyone

About

For Your Convenience Call Me At: (714) 768-2815 – LeeG@1stDynamic.com - www.BusinessSolutionsOC.com
It's been said... "If You Don't Know Your Numbers... You Don't Know Your Business" - based on what's been happening in 2020 to date, nothing could be more true. If ever there was a time when rethinking and recalibrating the way in which you do finance and accounting for your company or business, this might be a critical next step, today is that day. Perhaps we could help.

5 Key Elements:

1. Strategic Business Performance Analysis - QuickBooks is great for viewing archived information. However, being able to understand financials, trends & metrics is essential for adapting your strategies as you go forward.
2. Cash Flow and Break-Even Analysis - Managing your cash, increasing revenue & tracking expenditures is essential in managing operations & expense reduction.
3. Leadership Team Strategic Priorities & Follow-Through - Regular weekly staff meeting are critical component of a
4. Key Client (Customer) Outreach - Deliver more than you promise. Find what makes happy customers.
5. Leadership Team Strategic Planning - Not an academic exercise about BHAG, Vision etc. Rather Practical Strategic Goals, Objectives & Priorities to drive a business forward. Team building becomes a natural by product rather than an objective. See our Sample - Strategic Working Execution Planning.

Featured

- Monthly Strategic Planning CEO Think Tank
- Strategic Planning Workshop
- Monthly Orange

Zoom Meetings



Strategic Planning



Strategic Planning - Group Discussions



Strategic Planning Does Not Have To Be Stressful



Strategic Planning - Group Discussions



Group Discussions



1:1 Processes









P.O. Box 8272
Huntington Beach, CA 92615
(714) 768-2815
LeeG@1stDynamic.com
BusinessSolutionsOC.com