

MIGRATION CHART™ - A 1-PAGE PLANNING TEMPLATE

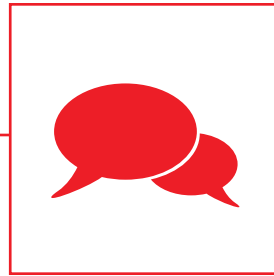
Migration Element	Moving From... (Point A)	Moving To... (Point B)
Revenue (\$\$ + %) Profit (\$\$ + %)		
Strategic Focus		
Major Challenges		
Infrastructure Changes <ul style="list-style-type: none"> • Values, Culture, Structure, Processes, Financial Administration, etc. 		
Personnel Changes <ul style="list-style-type: none"> • Skill, Attitude (Will), Policies, Experience, Staffing Needs, Learning, Mentoring, etc. 		
Sales & Marketing Changes <ul style="list-style-type: none"> • Channels, Markets, Customers, Competitive Advantage, Value Proposition, Materials, etc. 		
Measurement Changes <ul style="list-style-type: none"> • Leading Indicators, Lagging Indicators, Reports, Visibility, etc. 		

USING THE MIGRATION CHART™

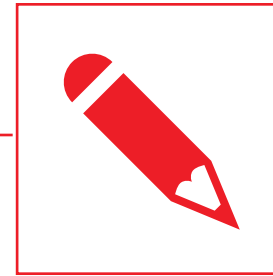
Leaders often tell me planning takes too much time and the plan itself is outdated the minute it's finished. The Migration Chart™ addresses these concerns. Follow these quick, simple steps to improve performance:



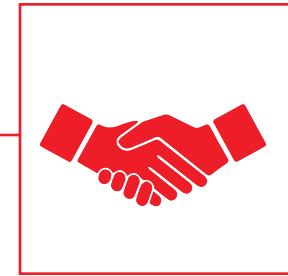
Distribute the Migration Chart™. Ask your leaders to complete the boxes in the "Moving From" column and bring their document to the next leadership team meeting. Also ask your team to bring a list of their 5 biggest barriers (issues, not names) that make it difficult to get things done.



In the meeting, write your team's responses for the "Moving From" boxes. Discuss areas where you are not in agreement and reach a consensus. Set a 30 minute time limit. If the discussion requires more time, schedule a separate meeting to address and resolve those issues.



Next, write the barriers your team has listed. Look for patterns, gain agreement and transfer the most significant issues to the appropriate box in the "Moving To" column of the Migration Chart™. These items may represent new priorities you and your team will need to focus on to improve performance. Set a time limit of 30 minutes.



Decide who will do what by when; gain commitment on the expected outcomes and agree on a timeline for the team to expect a progress report for the action to be taken.

Now, get to work!

Outside guidance can be a valuable asset during planning meetings. One of my main goals as a planning facilitator is to create a productive atmosphere that keeps leaders engaged and focused on practical planning. If you would like to learn more about my strategic planning process or speak with leaders I've worked with, please call me at 214.720.3707 or email me at greg.bustin@bustin.com.