

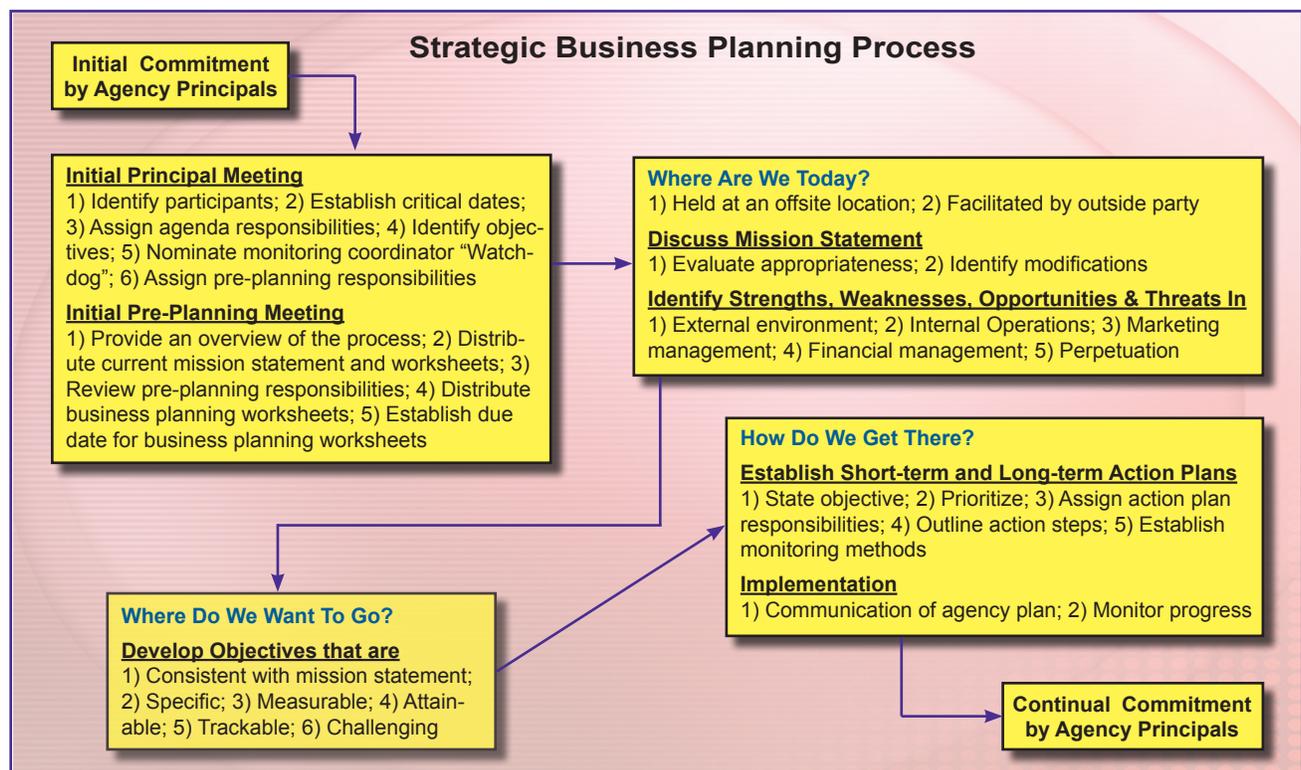
## Structuring a Business Plan

Is your agency's future planned or is it just luck that it remains in business? Most organizations do not have a formal strategic business plan that addresses how the organization will run in the future. However, the highest performing agencies, many of which are in MarshBerry's APPEX organization, conduct formal annual and/or quarterly strategic business planning sessions. A formal written business plan unifies agency leader's ideas and helps control the agency's future.

In preparation for a successful strategic business planning session all participants should 1) turn off cell phones; 2) Meet at an offsite location, away from distractions; 3) Have an open mind and be honest in discussions; and 4) Have a "Watchdog" over the strategic business plan to make sure objectives are being achieved.

An agency should have a mission statement that captures the essence of the organization. The mission statement drives every objective, date and individual's responsibility in the strategic business plan. The acid test is, "Is this objective consistent with the mission statement?"

The strategic business planning session should ask three questions which will guide the participants through the entire multiple day planning session. The questions are 1) Where Are We Today?; 2) Where Do We Want To Go?; and 3) How Do We Get There?



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