

# Top 5 Business Strategy Templates

Team FME



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## Introduction

The role of a manager has become more complex and the breadth of skills an individual must have to succeed has expanded considerably. You can no longer just be a subject expert you must have a working knowledge of key management skills.



Knowledge in the form of market intelligence is the life-blood of organizations and managers are constantly asked to supply such data to aid in the analysis of the internal capabilities of an organization. Managers must have excellent written and verbal [communications](#) so they can express themselves competently when discussing:

- [Financial](#) principles and statements
- [Strategy](#) and planning
- [Project Management](#)
- [Leadership](#) and [productivity](#)
- [Sales](#) and [marketing](#)

Being able to express your decisions and requirements in the language of each discipline above has become a basic requirement of any manager. Our FREE management resources will help you acquire the level of such skills needed to perform your role effectively.

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## Top 5 Business Strategy Templates

The following five templates are the most popular downloads requested on our website and each one will help you develop effective strategies for your organization.

Strategy Process

Porter's Five Forces

ANSOFF Matrix

Feasibility Report Worksheet

Key Financial Ratios

You no longer have to create your own template or wonder if you've thought of everything you need to do to perform a task the knowledge you need is at your fingertips.

1. [Strategy Process](#)
2. [Porter's 5 Forces](#)
3. [ANSOFF Matrix](#)
4. [Feasibility Report Worksheet](#)
5. [Key Financial Ratios](#)

Before each template there is a description of how it will aid your performance and some background information to clarify its purpose if you are using it for the first time.



## Strategy Process Checklist

This [Strategy Process](#) checklist explains the different stages organizations can use when creating and updating their strategy plans. Reviews of business strategies are not one of the key operations procedures successful organizations conduct on a regular basis.

The competitive environment of modern economies means organizations have to be able to respond to changes that occur in, or impact, their market quickly and efficiently. Organizational strategy has been defined as:

*'Strategy is the direction and scope of an organization over the long term, which achieves advantage in a changing environment through its configuration of resources and competences' Johnson et al. (2009).*

### Ways Managers can contribute to the Strategy Process

Management Reports

Executive Meetings

Presentations

Prototype Projects

Statistics from Pilot Schemes

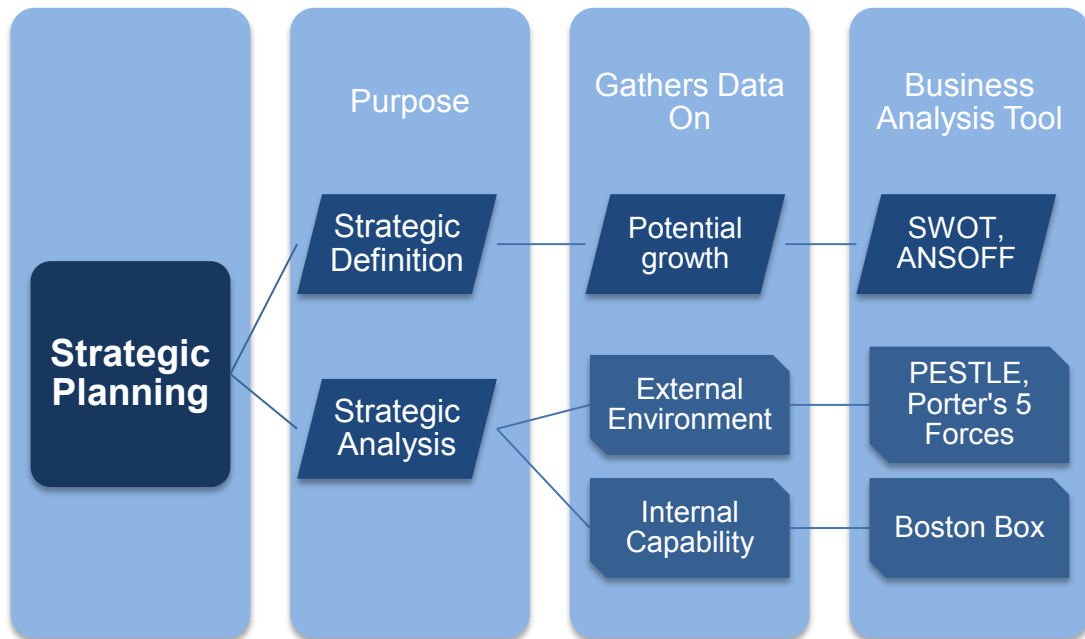
Managers have a greater degree of customer interaction in modern structures. The knowledge and expertise they acquire in this role enables he or she to make a key contribution to the strategic process. This can take many forms from attending executive meetings to the information contained in his or her reports.

You may also be asked to provide operational and market data to aid the strategic decision making process for the purpose of:

- Analyzing the external market or environment.

- Assessing internal capabilities of the organization.
- Assisting with the definition of the organization's strategy.
- Aiding in how the strategy is implemented.

For each of these functions there are different business analysis techniques and terminology that you will need to be familiar with so that your contribution adds value to the strategic decision-making processes.



The strategic definition process collects data on the potential opportunities and threats to organizational growth in broad terms and assesses the implications the latter could have on the organization. Two commonly used tools are:

- *SWOT Analysis* - identifies the strengths (S) and weaknesses (W) of the organization, and opportunities (O) and threats (T) present in the market that it operates in for each of its products and services.
- The *ANSOFF Matrix* - provides a framework to identify growth opportunities and assess the implications of growing the business through different market strategies.

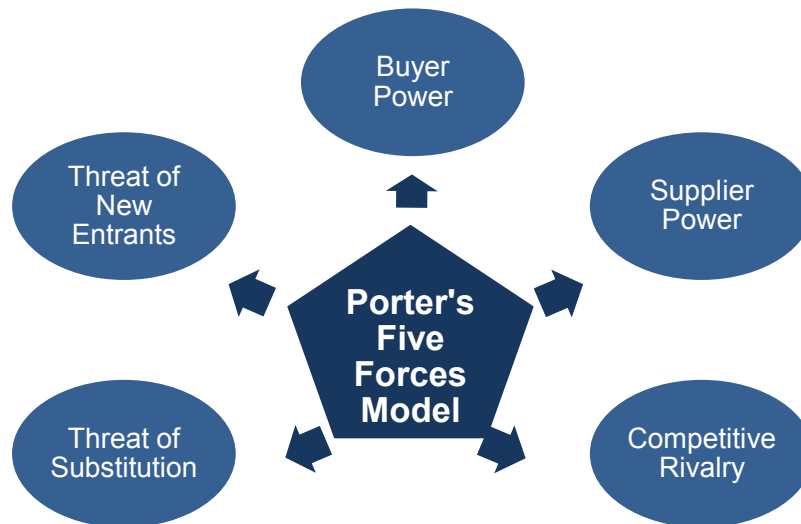
The strategic analysis process uses a variety of tools to assess both the internal capability of an organization to conduct a strategy and the external environment in which it must perform the strategy. The most commonly used tools in this process are:

- *Boston Matrix* – this tool is used to allocate resources according to the market position of a product or service. It can be used to analyze business units, product lines, and services.
- *PESTLE Analysis* – looks at the political (P), economic (E), social (S), technological (T), legal (L), and environmental (E) issues that may impact the abilities of an organization to grow. This tool is frequently used when entering new markets, countries, launching a new product or service as well as exploring new routes to market.
- *Porter's Five Forces Model* – uses the five issues of competitive rivalry, threat of new entrants, threat of substitutes, bargaining power of suppliers, and bargaining power of customers to detect and gauge potential opportunities and risks.

The [Strategy skills](#) resources page has additional information (eBooks, templates and checklists) on each these business analysis tools. Download your own copy of the [Strategy Process](#) checklist.

## Porter's Five Forces Template

The [Porter's 5 Forces](#) template allows you to quickly record the appropriate data you ascertain using this business analysis tool. As part of your strategy development you will be able to keep a note of the details as of each one of the five forces as they relate to your organization.



This business analysis tool is excellent for indicating when it is beneficial to invest by entering a new market sector that is poised for a large growth spurt and profitability. It can also show that a market is declining or contracting and is therefore one where investment needs to be carefully monitored possibly withdrawn.

Porter's 5 forces model is able to assess the affect of external pressures on range of products or services (rather than single products or services). It this ability to focus thinking that has seen its increased use in strategic decision making process. The extent to which each force impacts and influences your organization is unique to your type of operations, market place, location etc.

- *Supplier Power* – is the first of the forces on your organization. This relates to how much power your suppliers can exert over your operational ability. If the raw materials and resources you use are only available from a few organizations then they will have greater power to raise prices or control supply than if you

can easily swap between suppliers. The ethics of your supplier(s) and their sustainability will impact your strategic decisions accordingly.

- *Buyer Power* – relates to the amount of force your buyers can exert on your organization. For example, the fewer buyers you have for your product, the larger influence they can exert over your price and potential profits.
- *Competitive Rivalry* – the number of other organizations supplying your customers heavily influences the ability of your organization to manipulate for example, prices and distribution. If you are a monopoly then control of the latter is easier than in a highly competitive market where the greater power is with the market as a whole.
- *Threat of Substitution* – assesses the ability of your customers to swap to alternative service or product. If they can easily swap to another product your growth is heavily influenced by the degree of 'loyalty' your customers show. If the product cannot easily be sourced anywhere else your ability to influence your growth is greater. Your organization can't afford to be complacent because of the final force.
- *Threat of New Entrants* – the ability for other organizations to enter your market sector will play a significant role on its ability to grow profitably. Where considerable upfront investment and proprietary knowledge are needed to operate new entrants will find it hard to become established. But organizations need to keep a watchful eye on technological and social developments because they can quickly alter markets.

Download your own copy of the [Porter's 5 Forces](#) template.

## ANSOFF Matrix Template

This [ANSOFF Matrix](#) template will help you to detail the high-level implications of selecting one of its four strategies:

- Market Penetration
- Market Development
- Product Development
- Diversification

This business analysis tool builds on the findings of a SWOT analysis so that you are able to evaluate which one of the four strategies best fits your organizations growth plans. An organization's marketing strategy is a fundamental corner stone of its success, knowing the role your department and you as a manager play in executing this strategy are essential.



The horizontal axis of this matrix is based on 'Products' and the vertical axis is based on 'Markets' with the existing and new facets of each represented from left to right for the former and top to bottom for the latter. The four possible marketing strategies are:

- *Market Penetration* - is the quickest strategy as an organization simply pushes its product or services further into its existing markets using traditional methods such as advertising.
- *Market Development* – pushes existing products into new markets. The organization incurs limited additional costs in comparison to other marketing strategies it could adopt.
- *Product Development* – organizations choose to invest in the development of new products that they'll sell into their existing market. This requires a larger upfront investment to develop the new product or service than previous strategies. It does have the advantage that it can use existing distribution channels with little or no extra expense.
- *Diversification* – involves moving into new markets with new products, a costly and time consuming strategy. It is a highly risky venture where organizations will need to assess if the anticipated revenue growth is sufficient to warrant the required investment.

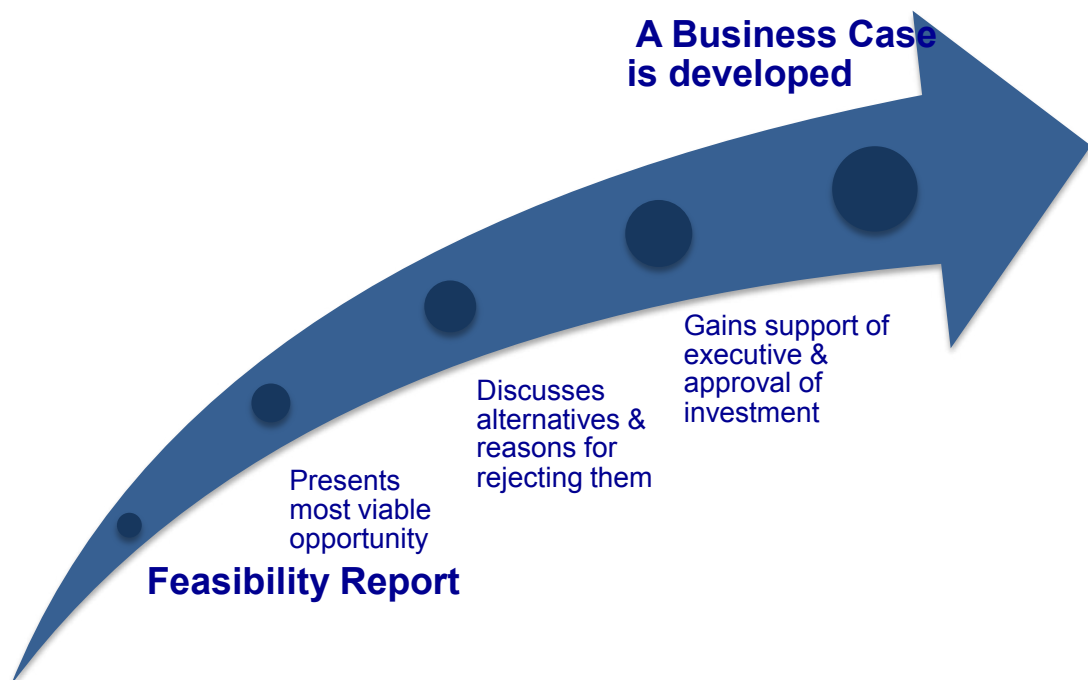
Organizations can gain considerable advantages from using this business analysis tool. It opens up their peoples' minds to potential opportunities, whilst getting them to judge if the required investment brings sufficient yield to be a viable option. This tool is an excellent catalyst for getting teams to view other options and ways to perform.

Download your own copy of the [ANSOFF Matrix](#) template.

## Feasibility Report Worksheet Template

The [Feasibility Report Worksheet template](#) provides a framework you can use to ensure that all necessary sections and details are contained in your report. This worksheet will enable you to produce a document that has a clear structure and contains all the necessary evidence to support your request for investment funds.

As a manager you will be expected to be creative and willing challenge the way the organization gets things done. This means you act as a conduit between your executive and the customer-facing workforce. Each group counts on you to present new ideas in a clear, concise and persuasive manner. One of the most effective ways to achieve this is by writing a feasibility report.



As you work through this worksheet you will need to identify a sponsor who will champion your feasibility report at the executive level. It provides you with the opportunity to quantify your research framework and show your evaluation process of alternatives you have considered. It also allows you to clearly identify where subject experts have been used as part of this process.



This template makes it easy to control the release and circulation revisions of your feasibility report before it gains approval or is rejected. Those feasibility reports that are signed off then form the basis for creating a detailed business plan.

The key sections of this feasibility report worksheet are:

- Executive Summary
- Methodology & Framework
- Market Definition
- Product or Service Definition
- Marketing Strategy
- Financial Projections
- Operational Considerations
- Findings and Recommendations

Within the report it is important that you define how the interests of stakeholders and end users are met bringing them additional benefits. The worksheet is easily modified to suit the specific needs of your organization.

Download your own copy of [Feasibility Report Worksheet](#).

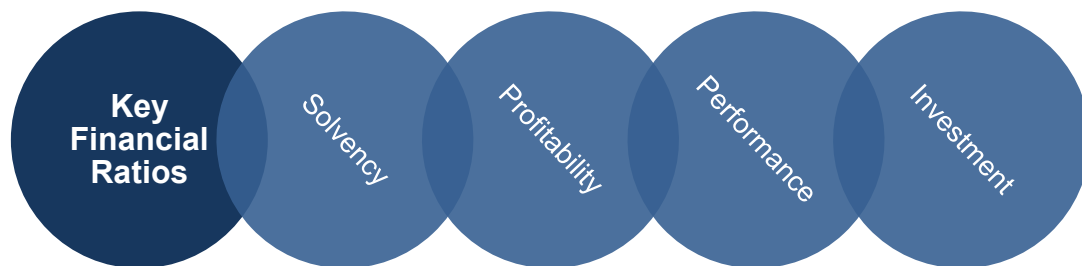
## Key Financial Ratios Checklist

Within the strategy process financial assessments form an essential part of the decision making process. The use of key [Financial Ratios](#) forms a fundamental part of these assessments.

This checklist explains which of the organization's financial statements you will need to make such calculations. There are four main documents you must have access to:

- Income statement
- Balance sheet
- Cash flow statement
- Statement of retained earnings.

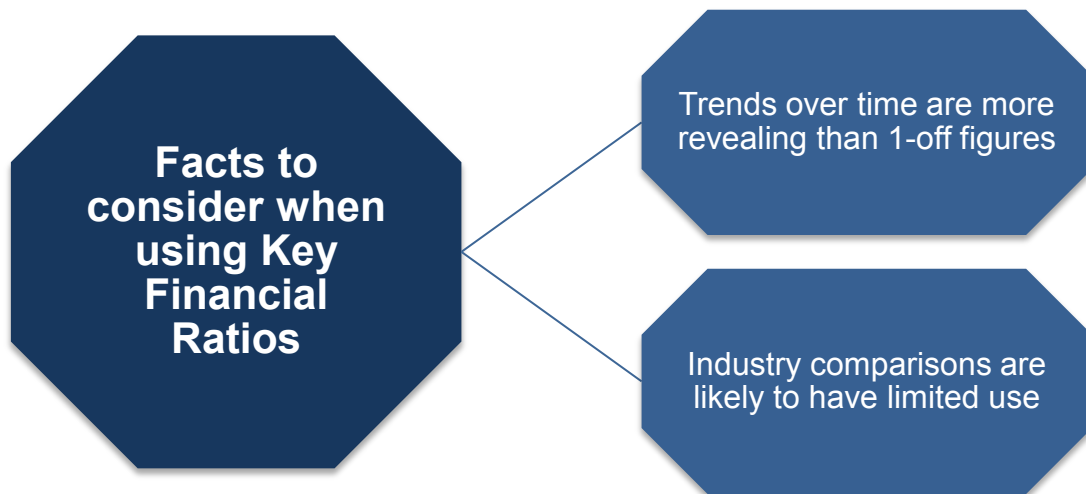
Financial ratios are usually classified in terms of what they measure i.e. solvency, profitability, performance, and investment history. To ensure that your calculations can be realistically compared and are informative you need to define a suitable benchmark.



Comparing an organization's current performance with its past performance, or comparing its performance to that of another similar organization are the most common ways this is done. Trends over time can be more revealing than an isolated figure. Industry comparisons need to be made with caution.

These calculations offer an invaluable image of how well an organization is managed. Many give the impress of profitability despite having serious structural problems that result from the way it is financed and managed. It is essential that before making any inferences following your calculations the

industry sectors operations and the organizations product or service offerings must be clearly understood.



The ability to evaluate the financial position of another organization is a valuable skill and can be used outside of the strategic process for selecting suppliers, strategic partners, or when to extend a customer's credit.

Download your own copy of [Key Financial Ratios](#).

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