



**LEAD THE CHANGE**  
**TLOMA CONFERENCE & TRADE SHOW**

# The Strategic Planning Gap :: From Planning to Implementation

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**SOUTHREN  
GROUP**

Empowering people to think, be and do better.



## Who Has a Strategic Plan?



Who has a strategic plan at your firm?



Is it being executed – day in, day out?



## The Strategy Gap



## The Strategy Trap :: From Retreat to Shelf



Leadership team  
retreat



Stellar strategic  
plan



ZERO  
Implementation

# The Strategy Trap





# THE STRATEGIC PLANNING GAP

## Know :: Be :: Do :: Your Strategy GPS

### KNOW ::

**What matters most.**

*Your direction.  
Your priorities.  
Your real goals.*

### BE ::

**Who you need to be.**

*The kind of team and culture that can deliver.*

### DO ::

**What you need to do.**

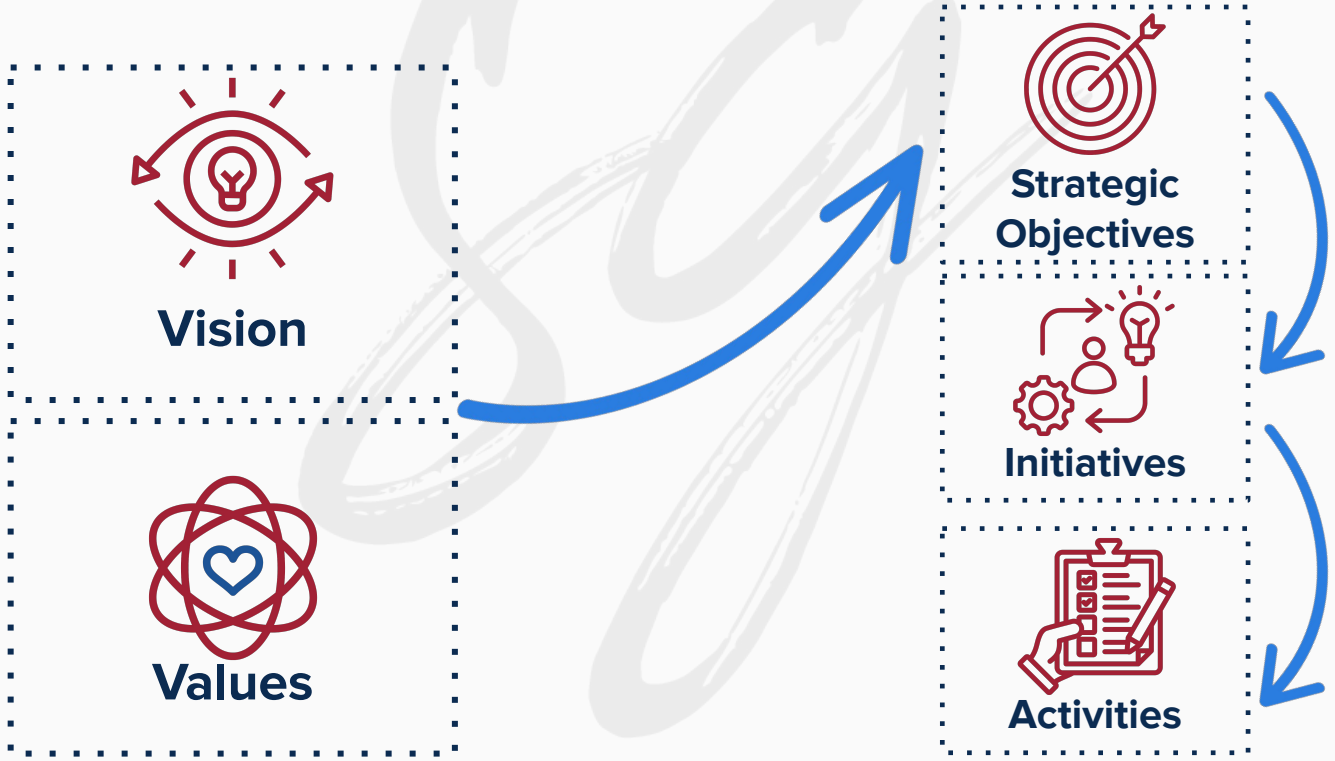
*The focused actions that move the needle.*





# THE STRATEGIC PLANNING GAP

## From Vision to Action :: A Plan That Works

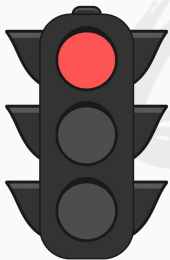




### What Great Looks Like – Real Examples

#### **Vague Strategy ::**

*“Improve our marketing presence.”*



#### **Strong Strategy ::**

*“Grow referral base by 25% in 2 years.”*

**Initiative:** Deepen accountant referral relationships

#### **Activities:**

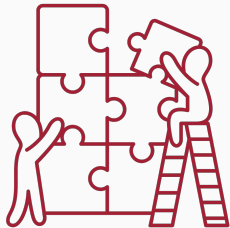
- 1. Schedule 3 outreach meetings*
- 2. Create pitch deck*
- 3. Host one roundtable*





# THE STRATEGIC PLANNING GAP

## Real World Fixes That *Work*



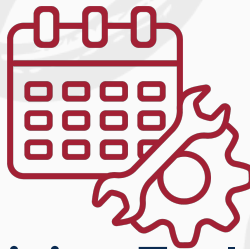
**Create Buy-In**



**Break It Down**



**Accountability**



**Living Tool**



**Calibrate vs.  
Recreate**



### Workshop :: Fix That Plan!

Does your firm have a *vision-heavy* plan, a *task-based* plan, or *no plan* at all?

What's one fix you could make, based on what we've just walking through?



## No Plan at All :: Here's Where to Start



**Vision**



**Values**



**1 Strategic Objective**





### Lead Strategic Conversations :: Whatever Your Title

“

**What pain points are we brushing past?**

**Who's missing from this conversation?**

**What assumptions are we still clinging to?**

**Is the plan still serving the business as it exists today?**

”



### Audience Activation :: One Strategic Move

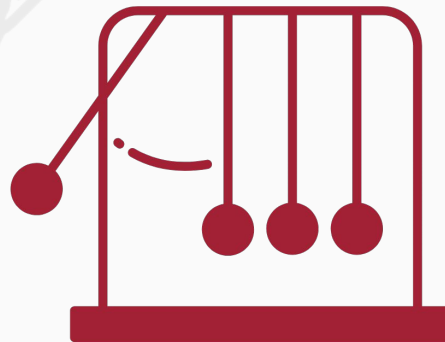
Write down **one small, intentional move** that will support your firm's strategy.

It could be:

*A conversation.*

*A question.*

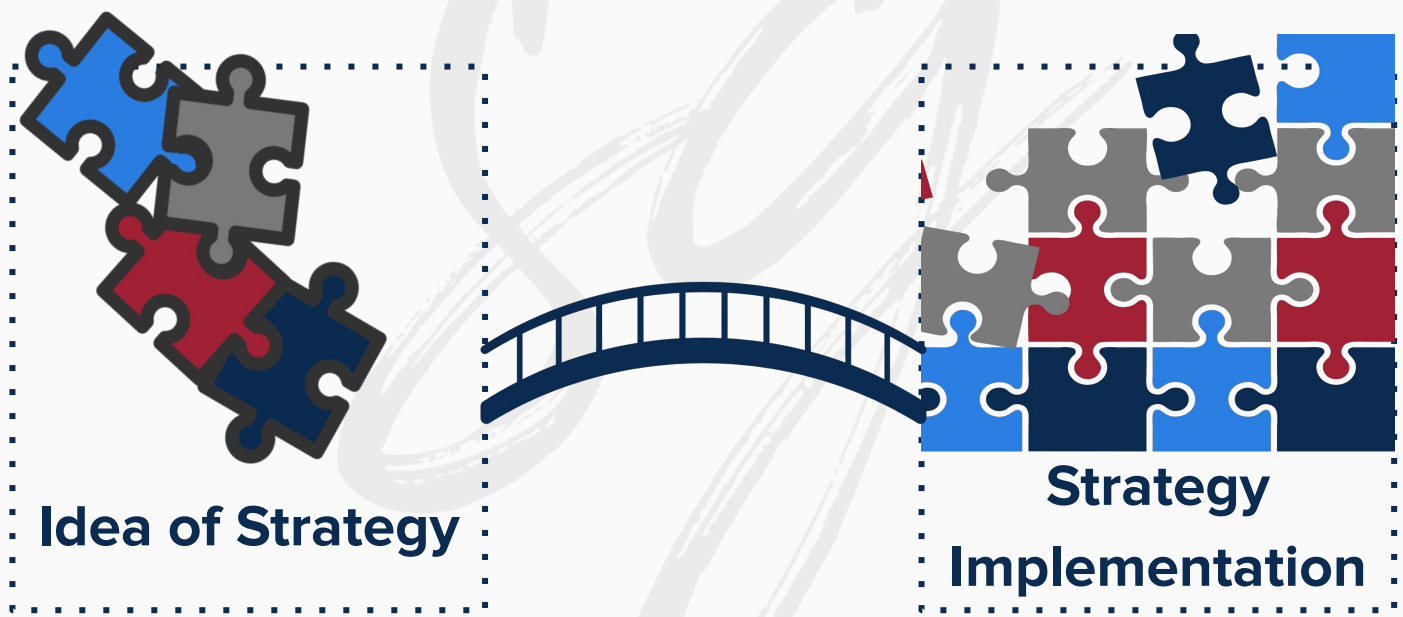
*A clarification.*



**Momentum builds from one small step.**



## Bridge the Gap :: Make Strategy Real





## 3-2-1 Strategy Realization Challenge

**3**

Things you learned today

**2**

Things you'll take back to your firm

**1**

Big, audacious action you're committed to taking