

**CPA LEADERSHIP INSTITUTE
ROSENBERG WEBINAR ON:
STRATEGIC PLANNING AND GOAL SETTING FOR RESULTS**

OUTLINE

- 1) Introduction
- 2) Crash course in strategic planning:
 - a) Definition of strategic planning
 - b) Benefits of strategic planning
 - c) The three main phases of strategic planning
 - i. Brainstorming
 - ii. Goal setting
 - iii. Execution
- 3) Flowchart of how CPA firms are managed.
- 4) 35,000 foot view of the strategic planning process.
- 5) Creating your strategic plan - a small number of high impact steps.
- 6) The annual strategic planning cycle of a CPA firm.
- 7) Why mission statements can be a waste of time.
- 8) The vision statement and brainstorming:
 - a) Vision statement
 - b) Brainstorming steps
 - c) How to stimulate the CPA firm brainstorming process.
- 9) Drilling down on the firm's highest priority goals and creating action steps.

- 10) How to create and operate a goal setting program:
 - a) The purpose of goal setting.
 - b) The very best practices.
 - c) Step by step goal setting procedures.
 - d) Individual partner performance plan.
 - e) Sample goals for partners.
 - f) 6 sources for partner goals.
- 11) Core values:
 - a) Ways that firms define core values.
 - b) Examples of core values.
 - c) Why the creation of core values is optional for many firms.
- 12) Keys to implementing a strategic plan, including partner accountability.
- 13) Conclusion.