

3.1: Putting It Together- Planning and Mission



If you don't know where you're going, any road will get you there.

Let's return our attention to Sun City Boards and its owner, Tom Wilson. Dani travelled to Tom's operations on the West Coast and confirmed her suspicions that the problems the organization is facing are due to a lack of planning. Dani is meeting with Tom to report on her findings and to submit her recommendations.

"OK Tom, I've spent the last several days going through your operations and records, and I'm confident that there are actions you can take that will help turn around the business."

Tom lets out a long sigh and says, "Dani, you have no idea how glad I am to hear that. So at a high level, what's the problem?"

"In a nutshell, the problem with Sun City Boards is that you have lost your focus and there is no clear plan for moving forward." Tom looks confused, so Dani explains. "When you started the business, what was your vision?"

Tom answers, "To set people free from the earth ... free to ride the waves."

"Perfect!" Dani responds. "And how were you going to do that?"

Tom thinks for a moment and then emphatically declares, "We will strive to provide the absolute best in high-end surfboard design and production!"

Dani tells Tom that he has just created the vision and mission statements for Sun City Boards. She further explains, "You have to start creating a focused plan that will help the organization deliver on its vision and mission. The reason your company is struggling is that there is no clear roadmap to success."

Tom asks, "What do you mean?"

Dani continues, "When you started the company you were very successful because you focused on one key thing—making the best surfboards anyone had seen. As a result, everything your business did revolved around that core idea."

Tom interrupts, "OK Dani, I think I see where you're headed. When we started making money in the early days, I began to start expanding into other areas without a lot of thought. I listened to salespeople who came in and told me that I should branch out into low-end surf gear, then swimwear, then camping gear. Customers don't know what we're all about any more. And neither do my managers and employees."

Dani can see Tom is getting his arms around the concept of vision and mission, so she moves on. Next, she presents her recommendation that Tom and his key leaders should come together regularly to create, review and update Sun City's business plan. This is new to the team, so she gives them a quick example:

1. **Define Objectives:** Sun City Boards should look to reduce noncore product lines and associated inventory. Minimum margin target is 35 percent across all remaining product lines.

2. **Develop Premises:** Monitor competitor's plans to implement a new polymer board and determine potential impact to Sun City's sales.
3. **Evaluate Alternatives:** Evaluate opportunity of opening new retail outlets along the West Coast. Also, explore international sales options for high-end surf boards.
4. **Identify Resources:** Analyze the level of capital necessary to achieve expansion goals and incorporate plan to close financial gaps in the annual budget.
5. **Plan and Implement Tasks:** Create a Gantt chart or other project planning tool that outlines the actions necessary to reach the goals outlined earlier.
6. **Determine Tracking and Evaluation Methods:** Create SMART goals for both managers and employees that align with direction the overall business plan provides.

Finally, Dani reminds Tom that the planning process is only a tool and that the plan should be regularly reviewed and updated. Dani warns him that planning is no substitute for taking action, but it is a guide for him and his team as to what actions should be taken.

This consulting project has reminded Dani how important it is for an organization to have a clear vision and mission to know where it's headed. Likewise, the planning process is critical to know how it's going to get there. The alternative is like trying to take a cross-country trip without a map—you don't know where you might end up!

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