

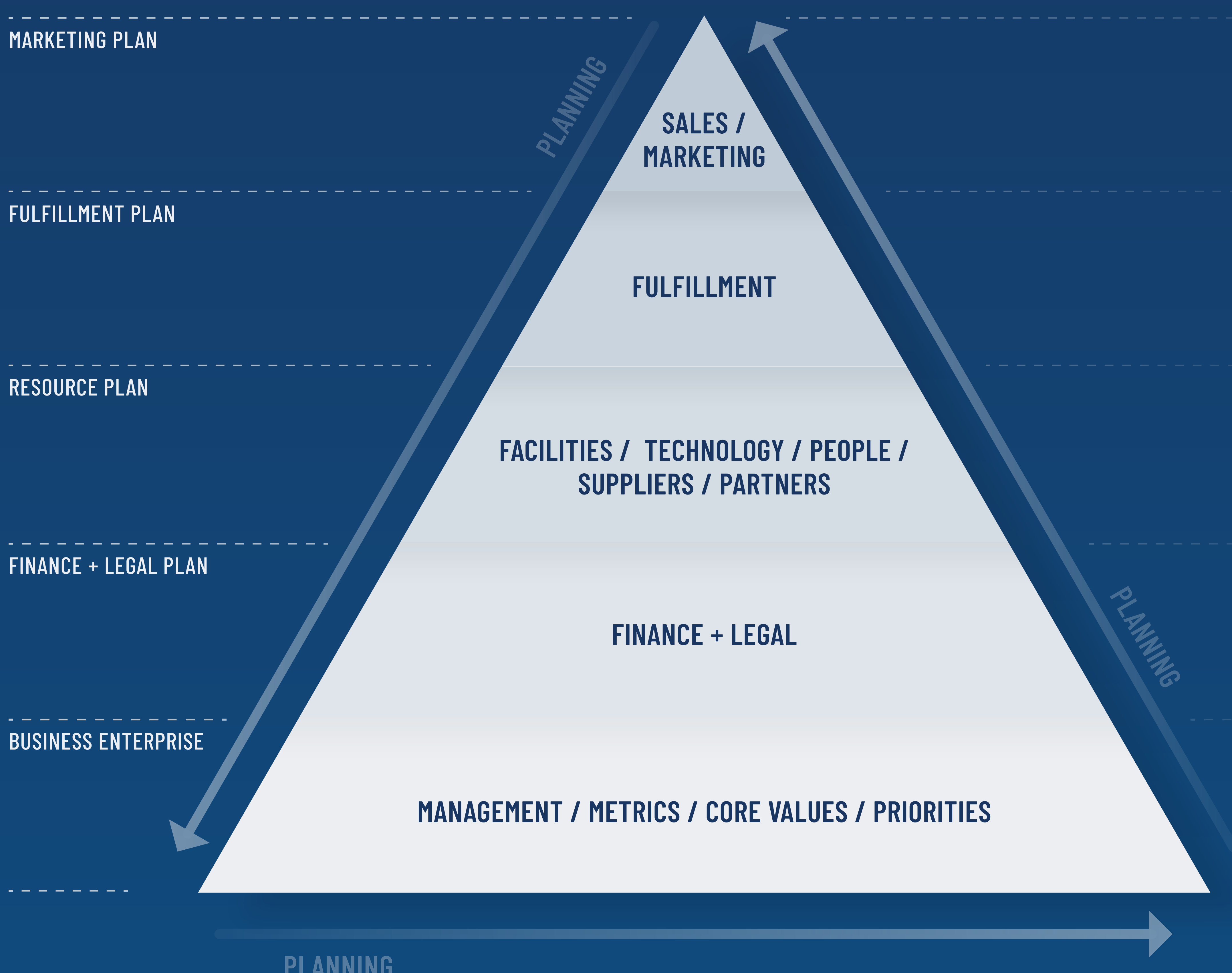
IMPACT

FINANCIAL STRATEGIES



Exit Planning Institute

# THE BUSINESS PLANNING PYRAMID



Each step broadens in scope and supports the steps above and across.

Plans are developed by sales channel which are uniquely defined based on differing functional process.

The Business Planning Pyramid was created by Exit Planning Institute CEO, Christopher Snider, to provide guidance on building integrated business plans that drive business value.

There are **five levels** to set a longer-term business strategy

- MARKETING PLAN
- FULFILLMENT PLAN
- RESOURCE PLAN
- FINANCE + LEGAL PLAN
- BUSINESS ENTERPRISE STRATEGY

**Planning** starts with the customer and flows down the functional model, then back up based on supporting resource capabilities, strengths, weaknesses, competitive advantages, and limitations.

**Implementation** is managed by establishing themes that support functional strategies and cross-functional areas. Then specific actions focusing on improving value factors are defined with themes.

A **matrix planning document** can be used to define common and unique processes by sales channel.

Ultimately, the **Financial and Legal Plan** determines the viability of the model based on financial capabilities, targets, and legal considerations.

