

STRATEGIC PLANNING PROCESS

for the

ILLINOIS SMALL BUSINESS DEVELOPMENT CENTER NETWORK



**ILLINOIS DEPARTMENT OF COMMERCE AND
ECONOMIC OPPORTUNITY**

Illinois Small Business Development Center Network Strategic Planning Process

The Illinois Small Business Development Center (SBDC) uses a simple but extremely effective, systematic, continuous, strategic planning process, which includes methods to; assess small business needs, provide for customer, stakeholder and staff input and also to evaluate program strengths and weaknesses. The process also provides the means to identify opportunities and challenges, to appraise the vision and mission and to reinforce core values.

Process Overview - The Strategic Planning Cycle includes an Annual Strategic Planning Session held each December with state office staff, center staff, host partner representatives and key stakeholders such as SBA personnel, DCEO leadership, Advisory Board members and other agency staff. The planning session includes an open discussion of the Network's Strengths, Weaknesses, Opportunities and Threats (SWOT) followed by a review of the vision, the mission and Network's core values. Consensus is also reached on key strategic issues and client segmentation that need to be addressed by the strategy. The planning process also includes the development/revision of strategic goals, objectives, implementation strategies and action plans.

Strategic Planning Groups - As an enhancement to the ongoing strategic planning process, the Illinois SBDC established five standing strategic planning groups that meet on an ongoing basis to review the strategic plan, identify potential opportunities and threats that need to be addressed on a timely basis and make recommendations for enhancements and revisions to the plan. The work of these planning groups is reviewed on an ongoing basis by the SBDC Leadership. The groups missions and the make up of the groups are reviewed during the annual planning session and necessary changes can be made at that time. Currently the five strategic planning groups include:

*Group 1 – **New Tools and Technology***; This group focuses on what is available for Centers to use to improve their operations and raise the level of services for clients, including “tools and products”. The work of the group includes efforts to identify a consistent product that can be used as a client assessment tool, research into web based training, education and other tools and resources, along with reviews of specific fiscal analysis and market research tools.

*Group 2 – **Network Positioning***; This group looks into how the programs are promoted and identified in the general marketplace and to our clients and stakeholders. It includes discussion on how we describe ourselves, (such as strategic growth partner; business advisors vs. counselors, as examples), the terms we use to describe our services (counseling vs. consultation); and the consistency of our branding and identity efforts. The group is also following the efforts to bring more identity and brand consistency at the national level.

*Group 3 – **Expert Services Team***; A team based approach could be an effective way to provide focused client assistance. This group focuses on the benefits of a team approach and explores the best way it could be implemented... regional vs. statewide approach, operational guidelines, etc... One critical issue is to determine how we ensure that all participating Centers in helping a client get the proper credit for their role with each client.

Group 4 – Core Services; The planning group focuses on ensuring that core/baseline services are delivered at each Center. The group reviews a menu of core services that each Illinois SBDC is expected to offer. The group reviews and recommends the core services and competencies of the SBDC and the specialty services including International Trade (ITC), Technology, Innovation and Entrepreneurship (TIES) and Procurement Technical Assistance (PTAC) Services. The ASBDC Core Competencies Committee findings served as baseline information for the groups work, along with information from the specialty programs.

Group 5 – Strategic Issues; This group consist of some of the networks forward thinkers and creative strategists. The group continually reviews trend information and reports about future impacts on businesses and discusses what the information means for the SBDC network. . Information reviewed regularly by the Strategic Issues group includes, Regional Comprehensive Economic Development Plans, state and national research and published reports on small business needs, information from chambers on business trends and local needs, and others sources such as the Intuit Report. The purpose of this group is to focus on potential opportunities and threats identified in the ongoing review and then to make timely recommendations to address the issues.

Each of these strategic planning groups meets at minimum, four times a year, but most of the groups meet more frequently to stay on top of issues and maintain momentum.

The overall Illinois SBDC planning process is very open and inclusive of all members of the Illinois SBDC network and key stakeholders. All are invited and encouraged to participate in the strategic planning groups and the ongoing planning process. All are also invited to the Annual Strategic Planning Session in December. Each of the Illinois SBDC Service Centers utilizes the statewide SBDC Strategic plan to develop individual center plans that integrate the priorities and objectives of the Illinois plan.

The strategy is monitored on an ongoing basis. The SBDC senior leadership and DCEO leadership meet to review the plan to ensure consistency and integration with the State of Illinois DCEO economic development plan. Strategy revisions are thoroughly discussed with and distributed to the directors and staff of the centers that make up the SBDC network.

Small Business/Clients/Stakeholder Needs

In order to ensure we are meeting the needs of small businesses and the SBDC network, input from key stakeholder groups has been the foundation of what drives the plan.

Some of these key stakeholders include the:

- SBDC Network Clients
- SBDC Host Institutions
- SBDC Center Staff
- SBDC Lead CenterStaff
- Other DCEO Small Business Programs
- DCEO Management
- State and Federal Legislators

Major Business Associations
SBA District and Branch Offices
Lenders and other key partner groups
Key State Agencies

Ongoing attention is given to identifying the specific strengths, weaknesses, opportunities and threats (SWOT) of the network and its operations. This SWOT analysis has proven to be very effective in guiding the future direction and strategic approach to implementing the SBDC plan.

In order to effectively implement the plan, internal communication to SBDC staff responsible for implementation is extremely critical. Ongoing communication is being accomplished through weekly senior managers meetings, regular weekly email communications, division staff meetings, weekly center operations review meetings with the Network Center Coordinators, quarterly staff reviews, regular center site visits and Monthly Connection Calls with the SBDCs and the centers delivering specialty services. Each of the strategic planning groups also meet regularly (at minimum 1 per quarter) to review the plan and develop recommended strategies for each of the specific areas.

To clarify the roles and responsibilities of plan implementation, specific measures, targets and deadlines for task completion are identified. Offices and individual staff have assignments, clearly defined tasks, resource allocations and time goals to measure their success.

As plan implementation continues, regular reviews of progress and communication to stakeholders is also important. The Illinois SBDC holds regular meetings of the Network Centers, at which time, the plan is discussed and progress updates presented.

To further ensure that current client needs are identified and included in the plan, we rely on results from the Illinois Small Business Needs Assessment Survey and other formal and informal “listening posts”. This on line survey is available through the Illinois SBDC website, Illinois SBDC Service Center websites and is also sent out to program clients. Results are tabulated and those needs are then reflected in the strategic planning process.

The latest strategic plan covers from 2012 through 2014. The plan is revised as needed during the annual strategic planning session in December, based on the ongoing work and input of the strategic planning groups.

In addition to the annual strategic plan review, the ongoing work of the strategic planning groups and planning review sessions, the Illinois SBDC evaluates input from key stakeholders and clients on an ongoing basis to ensure the plan remains relevant and effective. Feedback from clients is obtained from all program areas.

Illinois SBDC Service Centers all issue surveys to program clients, training participants and center clients. The feedback, along with input from key stakeholders and Service Centers drives this assessment of small business needs allowing us to identify new segments of customers, markets and even new stakeholders.

The SBDC Lead Center also utilizes the online tool SurveyMonkey system to solicit feedback on a regular basis from the network partners. Input is also solicited at the statewide center meetings and is part of the ongoing site visit process.

Feedback from key stakeholders through the planning process resulted in the simplifying of the more traditional SBDC Mission statement and led to the revision of the Illinois SBDC Vision. Stakeholders reached consensus on a more direct, simple mission statement and a revised vision. Below are both the original and current Mission and Vision Statements.

The Original Mission

To identify and serve the needs of Illinois small businesses and entrepreneurs, assisting them in sustaining and growing their businesses in a rapidly changing, global economy by providing comprehensive business assistance, training, information, advocacy and access to critical resources.

The Original Vision

To be recognized as contributing to a growing state economy, a robust, diverse small business community and to be Illinois' foremost integrating resource for information, assistance and advocacy.

The Mission

To provide professional guidance
for business growth.

The Vision

To be recognized as the leading resource
for business growth advancing the Illinois economy.