Integrated Planning and Budgeting Process

Overarching Vision

Forecasting

Environmental Scan

Develop Plan: How Are We Going To Change

Evaluate Planning Process

Prior Year Results

Strategic Priorities

Operational Strategies

Budgeting

Create Buy-In

Celebration

Measure/Evaluate Key Success Targets

Publish Report Card

Resource Allocation And Timing

Create Monitoring/Tracking System For Goals

Time Line To Achieve Goals

Leadership

Quarter 1
July, August, September

Quarter 2
October, November, December

Quarter 3
January, February, March

Quarter 4
April, May, June

Plan
- Create vision
- Light the fire
- Identify value
- Define roadmap

Lead
- Establish roles
- Mobilize the change team
- Inspire people
- Align change culture

Track
- Measure performance
- Measure financial results
- Monitor performance
- Raise the bar

Operate
- Drive initiatives and quick wins
- Hold people accountable
- Make tough decisions
- Celebrate successes