

# HELP TO GROW.

MANAGEMENT COURSE



## GROWTH ACTION PLANNING WORKBOOK

NAME

ORGANISATION



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This workbook uses a module-by-module approach to recording your notes as you go through the Help to Grow Programme. It will help you to identify priorities and turn your ambitions into reality through simple action planning.

Start filling in this workbook from the very first module, and make completing it a regular habit during the programme to ensure you capture your valuable learning and reflection in a format that is easy to return to and develop as you go along. You will be matched with a mentor who will support you to address the challenges facing your business and support you with your Growth Action Planning. More information about the mentoring is available in the mentoring area in the Induction area.

After each module, simply click on the relevant module link above and fill in your answers to the module questions.

Please ensure that you save your Growth Action Planning Workbook each time you use it to ensure that you do not lose any work completed

When you get to the final stage of the programme you will need to think about how everything fits together. Start filling in the Plan on a Page to present your thinking in a simple visual format that you can share and work on with others in the business.

# MODULE 1 Strategy and Innovation

1. What is the core Customer Value Proposition of your business?  
(you can change and develop this later)

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
<b>PESTEL</b> (Political, Economic, Social, Technological, Legal, Environmental)	
<b>Ansoff matrix</b>	
<b>Bain pyramid</b>	
<b>Business Model Canvas</b>	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose (what you want to achieve)</b>	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**

<b>Knowledge</b>		
<p>I understand what innovation is and the different ways an SME can innovate</p> <p>I am aware of techniques for developing strategy and identifying opportunities (e.g. internal and external analysis tools)</p>	<b>Mindset and Skills</b>	
	<p>I am able to describe the key elements of our business model and how they fit together</p> <p>I am motivated to seek new ways of doing things</p>	<b>Action</b>
		<p>I have started defining the core value proposition of our business</p> <p>I have started to use at least one of the module tools (Business Model Canvas, Bain Pyramid, Ansoff matrix, PESTEL) to map key areas of our business</p>

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## **MODULE 2** Digital Transformation

1. What stage of digital adoption/transformation is your business at now?  
What are your main digital opportunities?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

<b>Tools/exercises</b>	<b>Key Learning and Next Steps for your Business</b>
<b>Digital Audit</b>	
<b>Six Ps Model (Product, Process, Position, Paradigm (Business Model), Provisioning, Platform)</b>	
<b>Cyber Security Hygiene Checklist</b>	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

Purpose (what you want to achieve)	Action you will take	When you need to do this
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**5. Achieving the Module Learning and Action Outcomes**

<b>Knowledge</b>		
<p>I recognise opportunities and benefits that can be gained from my business adopting and keeping pace with digital technologies</p> <p>I am familiar with enablers (e.g. digital leadership) and risks (e.g. cyber attacks) of the digital environment</p>	<b>Mindset and Skills</b>	<b>Action</b>
	<p>I am motivated to spend time keeping abreast of key technological developments in my sector</p> <p>I am able to take a strategic approach to the implementation of new technologies in our business</p>	<p>I have completed a digital audit (see Module Workbook)</p> <p>I have identified areas of our business which are priorities for the adoption of new digital technologies</p>

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**



## **MODULE 3** Winning New Markets

1. What are the key new market opportunities for your business?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
<p><b>SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats)</b></p>	
<p><b>Types of Competitive Advantage (Cost Leadership, Differentiation, Niche Cost Leadership, Niche Differentiation)</b></p>	
<p><b>Porter's 5 Forces</b></p>	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose (what you want to achieve)</b>	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**

<b>Knowledge</b>		
I am familiar with the strategy adopted by a case study business to enter new markets, and their experiences along the way	<b>Mindset and Skills</b>	
	I am aware of the importance of innovation in developing new markets and vice versa	<b>Action</b>
I have reflected on the implications for our own business of developing new markets	I have shared at least one new idea I have gained from the programme with colleagues	
		I have noted key take-aways for my business from Modules 1, 2 and 3
		I have included our business's value proposition, core strengths and key opportunities in my Growth Action Planning

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.

## MODULE 4 Vision, Mission and Values

1. What are the vision, mission and values of your business?  
(You can return to develop these further as you continue the programme)

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
Components of Internal Culture – Iceberg Model	
Brand Personality Model (Aaker)	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

Purpose (what you want to achieve)	Action you will take	When you need to do this
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**5. Achieving the Module Learning and Action Outcomes**



List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## **MODULE 5** Developing a Marketing Strategy

1. How do you segment your customers and what are the characteristics of your key market segments?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
STP Process – Segmenting, Targeting, Positioning	
Developing a Target ‘Persona’	
Strategic Clock (Bowman and Faulkner)	
Marketing Ps (Product, Price, Place, Promotion)	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose (what you want to achieve)</b>	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**

Knowledge	Mindset and Skills	Action
I understand a strategic approach to marketing using segmentation, targeting and positioning	<p>I am able to identify the key market segments in our customer base</p> <p>I can recognise ways in which we can develop a more targeted approach</p>	<p>I have considered how we are positioned in the marketplace (Bowman's clock)</p> <p>I have shared at least one new marketing idea with colleagues</p>

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## **MODULE 6** Building a Brand

1. How would you describe the brand proposition of your business (or the story of your brand)?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
Brand Identity Prism	
RACE Planning Framework – Reach, Act, Convert, Engage	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose (what you want to achieve)</b>	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**

<b>Knowledge</b>		
<p>I am familiar with the brand values of a case study business</p> <p>I have heard an example of how a brand can support an SME’s market positioning and growth</p>	<b>Mindset and Skills</b>	
<p>I have listened to the ideas of fellow cohort members and shared my experiences with them</p> <p>I have reflected on the brand identity of my business</p>	<b>Action</b>	
	<p>I have started involving colleagues in Growth Action Planning using concepts and tools from the programme</p> <p>I have noted key take-aways from Modules 4, 5 and 6</p> <p>I have added vision, mission and values and strategic marketing priorities into my Growth Action Planning</p>	

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## **MODULE 7** Organisational Design

1. In what ways does your organisational structure need to evolve to achieve your long-term business goals?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
Adaptive Planning vs. Predictive Planning	
Organisational Structures – Hierarchy, Span of Control, Team-based, Matrix	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose (what you want to achieve)</b>	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**



List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## MODULE 8 Employee Engagement and Leading Change

1. What do you do currently that successfully engages employees and leads change in your business? What new practices will you implement?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
8 Steps Towards Change (Kotter)	
Force Field Analysis (Driving and Restraining forces towards change)	
Employee Engagement Facets	



3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose (what you want to achieve)</b>	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**

<b>Knowledge</b>		
<p>I am aware of approaches for leading transformational change such as force field analysis and Kotter’s model</p> <p>I understand techniques for leading and supporting colleagues through the process of change</p>	<b>Mindset and Skills</b>	
	<p>I have reflected on how effectively my firm engages our employees in matters relating to change</p> <p>I have defined how my leadership needs to evolve to support change</p> <p>I feel motivated to take up this change leadership role</p>	<b>Action</b>
		<p>I have started to work with senior colleagues to identify key changes needed to achieve our goals (for example using the Business Model Canvas)</p> <p>I have begun to change my leadership behaviour towards growth delivery</p>

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## **MODULE 9** High Performance Workplace

1. How does the leadership style in your organisation need to evolve as your business grows? What does this mean for you?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

<b>Tools/exercises</b>	<b>Key Learning and Next Steps for your Business</b>
<b>Transformational Leadership</b>	
<b>Change Transition Curve (Fisher)</b>	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

Purpose (what you want to achieve)	Action you will take	When you need to do this
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**5. Achieving the Module Learning and Action Outcomes**

Knowledge	Mindset and Skills	Action
<p>I am familiar with the strategy adopted by a case study business to re-configure itself to enable growth, increasing its employee engagement</p>	<p>I have a better sense of how my firm can more effectively deliver its growth plans</p> <p>I have listened to the ideas of fellow cohort members and shared my experiences with them</p>	<p>I have started working with colleagues on Growth Action Planning using concepts and tools from the programme</p> <p>I have identified and recorded key take-aways from Modules 7, 8 and 9</p> <p>I have added organisation design and change leadership plans into my Growth Action Planning</p>

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## MODULE 10 Effective Operations

1. Summarise how value is created in your business. What are the strengths and weaknesses of your current business operations?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
Value Chain Model	
Four Types of Operations Management Systems (Standardised Products or Services, Professional Products or Services, Design and Deliver Projects, Innovation as a Core Competitive Advantage)	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

Purpose (what you want to achieve)	Action you will take	When you need to do this
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**5. Achieving the Module Learning and Action Outcomes**



List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**



## MODULE 11 Finance and Financial Management

1. How well is financial information produced and used in your business? What changes need to be made to support decision-making based on financial data?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
Breakeven Analysis	
Cash Flow Forecasting	
Key Financial Metrics	
Options for External Finance	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose (what you want to achieve)</b>	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**

<b>Knowledge</b>		
<p>I am familiar with the Balance Sheet, Profit &amp; Loss Account and key ratios and what they tell me</p> <p>I understand what a Cash Flow Forecast is and why it is important for a growing SME</p>	<b>Mindset and Skills</b>	
	<p>I recognise how financial statements and data can help me monitor business performance</p> <p>I recognise the role external finance can play in supporting SME growth</p>	<b>Action</b>
		<p>I have considered my level of confidence with financial information and how to develop it by using the module workbooks</p> <p>I have used the Financial Information Checklist (workbook 2) with colleagues to assess how we use financial information in the business</p>

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

## MODULE 12 Implementing Growth Plans

1. Describe your long-term compelling vision.  
What key area of growth will you implement?

2. Key Tools and Models Featured in the Module  
What did you learn from these?

Tools/exercises	Key Learning and Next Steps for your Business
Drivers of Implementation	
Goal Timeline	
SMART Goal Setting – (Specific, Measurable, Achievable, Realistic, Time-bound)	

3. Note down your main take-aways and ideas from this module.  
What will these mean for your business?

4. Reflecting on your answers to questions 1-3, note down some key actions that you need to take to put your ideas into practice. (Remember that for more detailed action planning you can also use the GAP Detailed Action Planning Spreadsheet.)

<b>Purpose</b> (what you want to achieve)	<b>Action you will take</b>	<b>When you need to do this</b>
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**5. Achieving the Module Learning and Action Outcomes**

<b>Knowledge</b>		
I am familiar with a case study example of how a company planned, managed and resourced its growth	<b>Mindset and Skills</b>	
	I have shared our company's growth ambitions and key aspects of our plan with fellow cohort members	<b>Action</b>
	I am motivated to embed key management practices critical to growth and productivity in my business	I have added an implementation timeline to my Growth Action Planning
		I have arranged to meet with colleagues to discuss implementing and monitoring our Growth Action Plan
		I have considered joining the Help to Grow alumni to continue learning and engaging with the Help to Grow network

List here the areas you need to reflect on, develop further, or collaborate on with colleagues to help your business get the most out of this module.

**6. Write down the ideas and challenges from this module that you would like to discuss with your mentor.**

**BUSINESS NAME**

**VISION**

**MISSION**

**GOAL**

**GOAL**

**GOAL**

**GOAL**

**GOAL**

**GOAL**

**DATES**

**GOAL**

**GOAL**

**GOAL**

**GOAL**

**GOAL**

**GOAL**

**KEY ACTIONS**

**KEY ACTIONS**

**KEY ACTIONS**

**KEY ACTIONS**