

# 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 tab of 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
VRIO	
Ansoff matrix	
Business Model Canvas	

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 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?

Tools/exercises	Key Learning and Next Steps for your Business
<p><b>Four Benefits of Digital Transformation</b></p>	
<p><b>Strategic Priorities Exercise</b> (Product, Process, Position, Paradigm (Business Model), Provisioning, Platform)</p>	
<p><b>NCSC Check Your Cyber Security</b></p>	
<p><b>NCSC Cyber Action Plan</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.)

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**5. Achieving the Module Learning and Action Outcomes**



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**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</b> (Strengths, Weaknesses, Opportunities, Threats)</p>	
<p><b>Value Proposition Canvas</b></p>	
<p><b>Bain Elements of Value Pyramid</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</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 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  I have reflected on the implications for our own business of developing new markets  I have developed a customer focused mindset that drives our Value Proposition	<b>Action</b>
		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
Brand Identity Communication Canvas	
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**

<b>Knowledge</b>		
<p>I know how purpose, vision, mission and values are used in a business context</p> <p>I understand the relationship between a business's values, its organisational culture and employee engagement</p> <p>I appreciate the importance of brand in communicating this to external stakeholders such as target customers</p>	<b>Mindset and Skills</b>	
	<p>I can recognise whether my business's actions and communications reflect our purpose and values</p> <p>I am able to take a strategic approach to embedding responsible business and sustainability</p>	<b>Action</b>
		<p>I have drafted a vision statement and plan to review it with colleagues</p> <p>I have reviewed our value proposition in light of what I have learned in this module</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 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
<p><b>STP Process - Segmenting, Targeting, Positioning</b></p>	
<p><b>Strategic Clock</b> (Bowman and Faulkner)</p>	
<p><b>Marketing Ps</b> (Product, Price, Place, Promotion)</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**



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**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**



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**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	
Mental Health and Wellbeing exercise	
The Crises of Growth Model (Greiner)	

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 recognise key variables that influence organisational effectiveness</p> <p>I am familiar with different organisational structures and approaches</p> <p>I know why it is important to look after my team’s mental health and wellbeing and what professional resources are available to help</p>	<b>Mindset and Skills</b>	
	<p>I can identify options for evolving our organisational structure and roles to deliver our growth plans</p> <p>I feel confident and comfortable discussing mental health and wellbeing with colleagues</p>	<b>Action</b>
		<p>I have started to discuss with colleagues ways in which we might better organise our business to realise our goals</p> <p>I have identified practical things we can do to improve mental health at work and prioritised next steps</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 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 business 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 begun to change my leadership behaviour towards growth delivery</p> <p>I have started to work with senior colleagues to identify key changes needed to achieve our goals through transformational leadership approach and using tools to enhance employee engagement</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?

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

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

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 recognise the role of operations in the value chain</p> <p>I understand what type of operations we have in our business</p>	<b>Mindset and Skills</b>	
	<p>I can identify opportunities to improve our operations management</p> <p>I am motivated to consider sustainable and ethical dimensions in our approach to operational improvements</p> <p>I can see the benefit of innovating in our approach to operations management and where we may benefit from integrating new technologies and AI</p>	<b>Action</b>
		<p>With my team, I am evaluating our operational strengths and weaknesses</p> <p>I am working on areas of operational improvement 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 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?

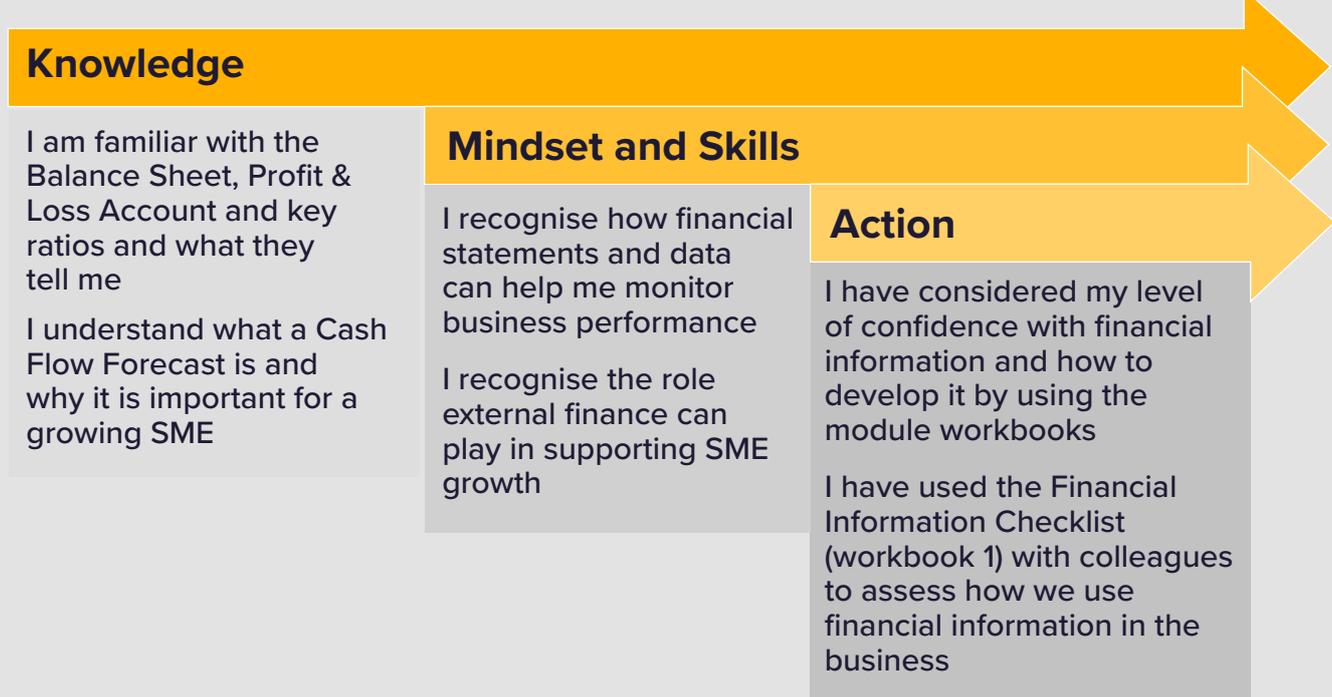
Tools/exercises	Key Learning and Next Steps for your Business
Break-even Analysis	
Cash Flow Forecasting	
Key Financial Metrics	
Options for External Finance	

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**



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

**VISION**

**MISSION**

GOAL

GOAL

GOAL

GOAL

GOAL

GOAL

**DATES**

GOAL

GOAL

GOAL

GOAL

GOAL

GOAL

**KEY ACTIONS**