

GENESIS STRATEGIC ANALYSIS CHECK-LIST

STRATEGIC DIMENSION	DIAGNOSIS		IMPLICATIONS, ISSUES & ACTIONS				
	Positives	Negatives	TOP MANAGEMENT	CORE FUNCTIONS			
				FINANCIAL	MARKETING	PROCESS	PEOPLE
1. External Macro Environment							
Economic Forces							
Business Cycle							
Government Economic Policies & Priorities							
Current & Forecast Level of Inflation							
Employment Prospects & Labour Mobility							
Wage & Property Income Levels & Expectations							
Capital Market Conditions							
Exchange Rate & International Trading Conditions							
Level & Rate of Growth of Gross Domestic Product (GNP)							
Political & Legal Forces							
Demographic Forces							
Technological Forces & Conditions							
Social & Cultural Forces							
Ecological / Physical Forces & Conditions							

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2. External Industry Environment							
Market & Customers Analysis							
<i>What is the nature of the market?</i>							
<i>Is the Market Growing?</i>							
<i>Are significant customers entering or leaving the market? What are the essential requirements & expectations of customers? Are they the same for all customers (does one size fit all)?</i>							
<i>What is the most appropriate way to 'segment the market'? Why? What are the characteristics of each segment (definition, size, location, growth, profile, needs, expectations, competition, positioning)?</i>							
<i>How much 'bargaining power' do customers have?</i>							
<i>How do buyers make their purchase decisions?</i>							
<i>What range of 'products' do customers perceive as 'substitutable'?</i>							
<i>What critical success factors are there in this industry?</i>							
<i>What skills are required to meet customer requirements?</i>							
<i>What resources are required to meet customer requirements?</i>							

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Competitor Analysis							
<i>How many rivals are competing for the same types of market or customers?</i>							
<i>Are there any strategic groups within the industry? On what basis are they formed?</i>							
<i>What drives the competition?</i>							
<i>How intense is the degree of rivalry?</i>							
<i>What major assumptions do specific rivals have?</i>							
<i>Are there new rivals entering or leaving the industry?</i>							
<i>How are rivals likely to respond to new circumstances?</i>							
<i>Are there any very strong or very weak competitors?</i>							
<i>Are there any rivals seeking to globalise their operations?</i>							

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Stakeholder Analysis (excluding customers & competitors)							
<i>What other specific organisations / individuals have legitimate interests in the specific environment?</i>							
<i>How do these other stakeholders exert their interests?</i>							
<i>Are there any significant relationships between stakeholder groups?</i>							
<i>Are these inter-relationships changing?</i>							
<i>What assumptions do specific competitors seem to hold about these stakeholders?</i>							
<i>How important are specific stakeholder groups to the achievement of competitors objectives and the implementation of their strategies?</i>							

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Value System (VS) Analysis							
<i>What is the nature of the specific system?</i>							
<i>What is the size of capital investment requirements at each level of the VS?</i>							
<i>Which level(s) add the greatest economic value (ie are the most profitable)?</i>							
<i>Which level(s) of the VS has the greatest degree of intra Value System bargaining power?</i>							
<i>Is there evidence of cooperation between the different levels?</i>							
<i>Is there a significant level of vertical integration, either upstream or downstream? Is this increasing?</i>							
<i>Is the value system or part of it significantly restrained by government policy? In what way?</i>							
<i>Is the value system or part of it significantly advantaged by government policy? In what way?</i>							
<i>Do any specific organisations have political clout or significant input into government policy making?</i>							
<i>Do international regulations / government policies significantly influence either customers or providers?</i>							

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Technological Analysis							
<i>How strategically important is technology to the market and its customers?</i>							
<i>How strategically important is technology to the current rivals?</i>							
<i>How often does major technological innovation occur?</i>							
<i>Does this innovation affect both processes and products?</i>							
<i>What is the development or lead time for new technology?</i>							
<i>What is the average economic life of technology? How profitable has it been?</i>							

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3. Financial Analysis							
Major Financial Ratios							
% Profit Margin							
Rate of Turnover of Capital							
% Return on Shareholders' Funds							
Gearing Ratio							
Liquidity Ratio							
% Average Annual Compound Growth Rates							
Sales Revenue							
Profit Margin							
Costs							
Return on Shareholders' Funds							

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4. Direction Analysis							
For each component (vision, mission, objectives, strategies)							
A clearly articulated, agreed and understood statement?							
Appropriateness?							
Sustainability?							
Required degree of strategic flexibility?							
Degree of Challenge?							
Extent of Shared Ownership?							
Degree of External Consistency?							
Fit with external macro environment							
Fit with external industry environment (target markets, customers, competitors)							
Degree of Internal Consistency (fit with internal environment)							
Organisation's strategic aspirations							
People's skills & expertise							
Cost & availability of required resources							
Other Criteria?							

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5. Human Resource Analysis							
Organisation Structure							
Reward, Motivation & Control Systems							
Resource Allocation & Deployment Process							
Management Style / Culture							
Leadership							
Planning & Decision Making Process							
Key People / Decision Makers (by person)							
Personal Vision?							
Personal Values?							
Personal World View, or Mental Map?							
Major Skills?							
Key Professional Experience and Expertise?							
Major Personal Organisational Contributions?							
Personal Biases or Blind Spots?							
Skill Profile							

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6. Marketing Analysis							
Market Research							
Segmentation & targeting							
Product Development							
R&D Capabilities							
Image & Branding							
Promotion							
Customer Relationship Management							
Marketing / Value Delivery Resources							
Pricing							
Distribution							

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6. Process Analysis							
Physical Resources							
Business Processes							
Information Resources							
Technological Resources							
QA/QC Systems							
Learning Resources / Systems							