

Unit specifications

Unit 1 Strategic Planning			
Unit aims	The aim of this unit is to develop the knowledge, understanding and skills necessary to develop an organisational strategic plan.		
Unit level	7		
Unit code	T/650/5360		
GLH	60		
Credit value	15		
Unit grading structure	Pass-Merit-Distinction		
Assessment guidance	<p>To achieve this unit, learners must produce work which demonstrates achievement of the learning outcomes at the standards provided by the assessment criteria.</p> <p>Learners must relate their work to the ATHE assignment scenario and use real life examples to illustrate their points. There is a requirement to use information from specific organisations to meet some of the stated standards. Learners will need to agree an appropriate organisation on which to base their study with their tutor. Tutors need to ensure that the organisation chosen is suitable. Additional assessment guidance is provided in the ATHE assignment.</p> <p>Learner work should demonstrate substantial coverage of the unit indicative content.</p>		
Learning outcomes The learner will demonstrate that they:	Assessment criteria The learner can:		
	Pass	Merit	Distinction
1. Understand the foundations for developing organisational strategy	1.1 Explain the relationship between mission, vision, strategy, and business plans 1.2 Analyse a named organisation's mission and vision statements 1.3 Explain how external factors and stakeholder expectations influence organisational strategy	1M1 Evaluate the impact of a named organisation's vision and mission on its strategy	1D1 Analyse how external influences affect organisational strategy in a named organisation
2. Can review an organisation's strategy and business plans	2.1 Explain the importance of review in the development of organisational strategy and business plans 2.2 Evaluate the tools which can be used to review organisational strategy and business plans	2M1 Review the position of an organisation in its current market using appropriate tools	2D1 Analyse the competitive strengths and weaknesses of an organisation's current business strategy and business plans

3. Can develop strategy options for an organisation	3.1 Use modelling tools to develop strategy options for an organisation 3.2 Develop criteria for reviewing the potential strategy options	3M1 Evaluate the options as the basis for delivering the strategic direction of the organisation by applying the criteria developed	
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Indicative Content

LO1 Understand the foundations for developing organisational strategy

- Explanations of organisational vision, mission, strategy, and business plans; the differences and the interface between them
- Core organisational values e.g., ethical, environmental, client centred; cultural diversity; drivers e.g., business growth; profit; market share; workforce expectation
- Objectives and measures: SMARTER (specific, measurable, achievable, realistic, time-based, evaluate, re-evaluate) objectives; stakeholder involvement
- External factors: needs and expectations of stakeholders e.g., customer groups, shareholders, suppliers and sub-contractors, the workforce, and the community
- The success and direction of competitors and changes in the market sector in the short and long term e.g., product design; political changes and developments; legal changes; trends and expectations; exchange rates; trading agreements
- Use of external surveys and statistics; customer analysis and feedback; use of tools e.g., SWOT (strengths, weaknesses, opportunities, threats) analysis, STEEPLED (social, technological, economic, environmental, political, legal, ethical, demographic) analysis; market research including primary and secondary information; feasibility

LO2 Review an organisation's strategy and business plans

- The purpose of review and what this will entail; tools e.g., Value Chain analysis, SWOT, PESTLE analysis, Porter's Five Forces; internal surveys and statistics
- Market position; market share analysis; life cycle analysis; Boston growth share BCG Matrix
- SWOT analysis, resource analysis, competitive analysis, skills, and competencies audit, benchmarking sustainable competitive advantage; pricing strategies; resource analysis; economies of scale and scope for this; market equilibrium

LO3 Develop strategy options for an organisation

Strategic planning options:

- Ansoff Matrix Strategies; corporate expansion; integration i.e., vertical, backwards and forwards; horizontal; differentiation; Porter's generic strategies
- Diversification, control of resources, distribution channels; Mintzberg's strategies (deliberate, emergent)
- Strategic alliance; merger, acquisition; competitive strategies
- Value-based strategy; contingency strategy; maintaining/increasing market share, niche markets; market segmentation
- Adding value; workforce competence development; product portfolio; reconfiguration; gap analysis; profitability; portfolio analysis; benchmarking
- Portfolio analysis; benchmarking
- Criteria for judging options; feasibility studies; risk assessments

Suggested Resources

Bryson, J.M., Edwards, L.H. and Van Slyke, D.M. eds., 2022. Toward a More Strategic View of Strategic Planning Research, Taylor & Francis

Dobbs, J.H., Dobbs, J.F., 2016, Strategic Planning - A Pragmatic Guide. Independent Publisher

Hill, A., 2020, Manufacturing Operations Strategy: Texts and Cases, Bloomsbury Publishing

Johnson, G., Whittington, R., Regnér, P., Angwin, D. and Scholes, K., 2020, Exploring Strategy, Pearson UK.

Poore, C.A., 2021, Strategic Impact: A Leader's Three-Step Framework for the Customized Vital Strategic Plan, Greenleaf Book Group

Rumelt, R.P., 2017. Good Strategy/Bad Strategy: The Difference and Why It Matters, Strategic direction, 28(8)

Strategic Planning, Adobe, 2022, Retrieved from: shorturl.at/GIMXY

Websites

<https://asana.com/resources/strategic-planning> - resources for strategic planning

<https://balancedscorecard.org/strategic-planning-basics/> - The Balanced Scorecard Institute (BSI)

<https://online.hbs.edu/blog/post/why-is-strategic-planning-important> - Harvard Business School Online's Business Insights Blog

<https://www.bgateway.com/resources/strategic-planning-the-basics> - Business Gateway

<https://www.cascade.app/blog/how-to-write-a-strategic-plan> - Cascade

<https://www.local.gov.uk/pas/plan-making/strategic-plans/considerations-effective-strategic-planning> - Local Government Association

Unit 1 Strategic Planning - Supporting information	
Opportunities for Synoptic Teaching and Learning	
Learners and tutors will have the opportunity to link the learning from this unit with the content of other units.	
Learning Outcome	Teaching and learning links to other unit LO/AC
LO1 Understand the foundations for developing organisational strategy	Unit 3 Research for Strategic Development, LO1 Produce a research proposal relating to strategic business development Unit 5 Personal Development for Leadership and Strategic Management, LO1 Understand how knowledge and skills in leadership and strategic management support the creation and achievement of organisational vision and strategy Unit 7 Developing Organisational Vision and Strategic Direction, LO1 Understand how to develop an organisational vision and strategic direction
LO2 Review an organisation's strategy and business plans	Unit 2 Finance for Strategic Managers, LO1 Understand the importance of financial data in formulating and delivering business strategy Unit 14 Managing Continuous Organisational Improvement, LO3 Plan change for organisational improvement
LO3 Develop strategy options for an organisation	Unit 7 Developing Organisational Vision and Strategic Direction, LO3 Understand how to implement organisational vision and strategic direction Unit 10 Strategic Marketing, LO3 Develop a strategic marketing plan Unit 11 International Marketing, LO2 Understand how to develop an international marketing strategy
Opportunities for Synoptic Assessment	
Some of the AC require knowledge from one or more of the LOs.	
LO3 Develop strategy options for an organisation draws on and applies the knowledge and understanding developed via LO1 and LO2.	

Opportunities for Skills Development within this unit	
Employability Skills	Study Skills
Problem-solving – Using analytical skills, e.g. research skills, handling information, consulting multiple sources, categorising information. Using critical thinking skills, e.g., listening to/reading all information,	Thinking skills - Using analytical skills, eg research skills, handling information, consulting multiple sources, categorising information. Using critical thinking skills, eg listening to/reading all information, identifying and interpreting others' positions, arguments and

identifying others' positions, arguments and conclusions, weighing up opposing arguments (avoiding jumping to conclusions, spotting fake ideas/news) drawing conclusions **(LO1, LO2, LO3)**

Communication skills – Written communication eg appropriate formats, style and tone, spelling, punctuation and grammar **(LO1, LO2, LO3)**

conclusions, weighing up opposing arguments (avoiding jumping to conclusions, spotting fake ideas/news), drawing conclusions **(LO1, LO2, LO3)**

Using sources of information – Accessing information ie choosing current, sufficient, relevant and reliable sources **(LO3)**

Writing skills – Understanding the purpose of writing. Understanding writing styles and forms eg narrative, explanatory, research, and business. **(LO3)**