

Add a competitive edge to your strategic planning business.



PLAN

COLLABORATE

ASSESS

ALIGN

SUSTAIN

SUPPORT

we PlanWell TM

*better planning
better performance*

COMPREHENSIVE, ONLINE STRATEGIC PLANNING TOOL

Advance your planning process



Powerful, yet simple to use, WePlanWell streamlines your planning process, improving efficiency at every step. With WePlanWell you can work on a plan online in real time with your clients, and update plan documents and reports in minutes, not hours. Best of all, when you become a WePlanWell consultant, you can offer your clients access to an intuitive tool designed to help drive the implementation and management of their plans. Developed by a team of strategic planning consultants, WePlanWell is both a comprehensive, online strategic planning tool and a powerful strategic performance tool. Use it to advance your planning process, add immediate value to your clients, and give yourself a competitive edge.

plan | assess | perform | align | sustain



BUILD PLAN

Flexible, time-saving features for better plan development

Our flexible process for creating, implementing and managing your clients' strategic plans offers you the ability to customize many areas in WePlanWell to meet your consulting style and client needs, including nomenclature. As an online tool, WePlanWell centralizes the strategic plan data. When you update one area of the plan the change is made everywhere, from the plan documents to the assessment scorecards, saving you time and ensuring users always have access to the most current version. It also means that the current version of all your client's plans are available to you and your clients anytime, anywhere, through WePlanWell.



COLLABORATE

Simple, efficient cooperation

The WePlanWell collaboration feature makes working with staff and other key stakeholders easier than ever before. This cooperative editing feature allows users to suggest, review and comment on changes to selected areas of the plan. Imagine how much time you can save with this simple, efficient way to update or revise Mission or Vision Statements or any part of your strategic plan.

plan | assess | perform | align | sustain

ASSESS & REPORT

Ensure implementation with assessments and reports

A strategic plan is only as good as its implementation. That is why we built accountability into the WePlanWell tool. Our assessment features and the scorecard reports provide your clients with at-a-glance information about what efforts are moving forward and where they have roadblocks to assess. A range of reporting options makes it easy to measure and report on plan implementation and performance at both management and governance levels.

ALIGN

Tie individual performance to the Strategic Plan

WePlanWell offers a comprehensive Individual Performance Planning feature your clients can use to supplement an existing performance evaluation process, or become the basis of a new one. The IPP feature gives clients the ability to set and track individual goals or To Do Lists that directly align with the strategic plan. No other strategic planning and performance tool offers anything like it. It's just another way WePlanWell gives you a competitive edge.



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SUSTAIN

Strengthen client relationships and build your business

WePlanWell helps your clients sustain implementation of their strategic plan over the long term. It also can help you sustain enduring relationships with those clients. As a WePlanWell consultant you can check in on your clients' plans online to evaluate how well their implementation and plan tracking and assessment is progressing. That creates a natural opportunity for follow up, and opens doors to new opportunities for building income.

SUPPORT

Full training and support

When you become part of the WePlanWell community, you gain access to comprehensive training and technical support to help maximize your effectiveness. Additionally, we will provide support to your clients as they adopt the tool, or if you prefer, train you to manage their needs.



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To learn more, or to arrange a demonstration, contact your strategic planning consultant or
email contact@weplanwell.com

BUILD THE PLAN

BETTER PLANNING ————— BETTER PERFORMANCE

Cut your documentation time down exponentially,
eliminating endless revisions of Word/Excel documents.

With WePlanWell you can:

- Build high-level strategies as well as implementation tactics with specific time frames, responsible parties and required resources. Create robust plans that are clear to implement.
- Customize plan nomenclature to fit your consulting style or each client's preferences.
- Edit quickly and easily. The change is immediately reflected in every report and document affiliated with it.
- Use the built-in electronic whiteboard feature for easy brainstorming in meetings.
- Modify how text will appear in various plan documents using the full formatting palette.
- Collect suggestions from key stakeholders on plan elements, such as Mission Statement, using WePlanWell's unique Collaboration feature. See all suggestions at-a-glance and use this feedback to speed the planning process and encourage buy-in.

This intuitive and flexible tool can streamline your planning process and improve efficiency at every step. Add value and maximize relationships with your clients, and build your business base with WePlanWell.

To learn more: contact@weplanwell.com or call 913/642-1416

ASSESS & REPORT

BETTER PLANNING ————— BETTER PERFORMANCE

The strategic plan you develop with your client is intended to be their roadmap to the future. But a plan is only as good as its implementation. Careful tracking, ongoing assessment and reporting of key performance measures and significant activities associated with the plan will drive their journey.

With WePlanWell your clients can:

- Assess the plan at every level, from high level initiatives and key performance measures to specific individual tactics.
- Assess and comment on progress on all plan elements, including percentage complete, by quarter and by year.
- Automatically pull data from assessments into scorecard reports for at-a-glance information about performance and progress at both high level Governance and day-to-day Management.
- Access the Planning Calendar, automatically created as the plan is developed, which lists objectives, actions, responsible party(s) and the most current assessment of the plan elements.
- Analyze the Resource Planning Calendar, also created automatically as the plan is developed to view by type, plan year and responsible party all the resources required to implement the plan.
- Export plan documents, assessments and reports in several formats for easy copying and presentation.
- Update any element of the plan and immediately find the change reflected in all reports and assessment options.

As a WePlanWell consultant, you can offer your clients access to a tool that assures plan execution is easier to monitor and more straight forward to assess than ever before.

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INDIVIDUAL PERFORMANCE PLANNING

BETTER PLANNING ————— BETTER PERFORMANCE

As every consultant knows, one of the keys to successful strategic plan implementation lies in specifically linking the performance of every individual employee, every stakeholder, to the plan itself. The Individual Performance Plan (IPP) feature of WePlanWell gives users the ability to easily identify, track and measure performance goals for everyone with responsibilities connected to the plan. It also can serve as the complete Individual Performance Management system for the entire organization.

Using the IPP feature your clients can:

- Easily align employee performance goals with strategic plan goals; each employee can instantly download their strategic plan responsibilities directly into their IPP.
- Expand the IPP to reflect strategic plan responsibilities as well as day-to-day job requirements and individual development goals.
- Support and enhance your client's existing performance management process
- Utilize the IPP assessment feature, available to both employee and manager, for tracking and reviewing individual performance. This tool captures the assessments and comments made by both parties on each element of the IPP.
- Create at-a-glance reports making it easy to identify where progress is being made or where additional attention, review or support is needed.

The Individual Performance Plan feature offers your clients a tool they can use to assure their organization's time and energy is focused on the highest-level priorities of their plan. It is just one of the innovative benefits you can offer your clients when you become a WePlanWell consultant.

To learn more: contact@weplanwell.com or call 913/642-1416

UNIQUE FEATURES FOR THE NONPROFIT SECTOR

BETTER PLANNING ————— BETTER PERFORMANCE

Today nonprofit organizations are being challenged as never before to assess their operating structures, evaluate their mission and programs and justify their budgets.

Forward-thinking organizations are seeking ways to thrive in this new environment, not simply survive. Strategic planning is the key.

Using WePlanWell gives your nonprofit clients the ability to:

- Align staff, board and committee efforts and performance directly to the mission and strategic plan.
- Generate board member and committee To Do Lists with responsibilities directly from the strategic plan using the Individual Performance Planning (IPP) feature.
- Focus board and committee meeting agendas and efforts on Governance responsibilities and oversight of strategic plan implementation, utilizing the Assessment and Reports features.
- Transform the plan review and revision process using the Collaboration feature. Board and staff members can log into the plan from anywhere and leave comments on plan elements that other members can easily see at-a-glance.
- Eliminate hours of preparation each month by streamlining the creation of informative reports, including Scorecards, to provide efficient and effective communication with board and committees about plan progress.
- Pull information for grant requests or reports to the board or funders quickly and easily.
- Update the strategic plan per board or committee input with just a few clicks of the mouse.

Developed by experts in nonprofit strategic planning, WePlanWell is designed to help your nonprofit organization stay current, stay focused and stay on track.

To learn more: Contact your strategic planning Consultant or email contact@weplanwell.com