



Instructions for Using the Planning Template

Our user-friendly Strategic Planning Template for Retail Management places the retail planning process into a series of steps that are integrated with Figure 3-1 on page 53 and Table 3-5 on page 71 of *Retail Management, A Strategic Approach*, 13th Edition by Barry Berman, Joel R. Evans, and Patrali Chatterjee. Through this template, you will be able to build a full strategic retailing plan and then print out that plan.

There are FOUR PDF files to use with the Strategic Planning Template:

1. The instructions (this file)
2. The master template (which can be typed into directly after opening the file)
3. A sample strategic plan based on the template (involving an independently-owned high-fashion ladies clothing store)
4. Scenarios for nine retail situations that may be used in an assignment from your professor or by you to practice your planning skills. Each retailer has unique strengths and weaknesses and faces different opportunities and threats:
 - a. An Italian restaurant
 - b. A camera retailer
 - c. An appliance chain
 - d. An appliance repair service
 - e. A major department store chain
 - f. A Web-based jeweler
 - g. A supermarket
 - h. An omnichannel electronics store
 - i. Campus coffee shop

Master Template

The master template is set up as a PDF form. This means that you may type directly into the form; and when you are done, you have a complete, integrated plan that may be saved and printed. The template walks you through each strategic planning step described in *Retail Management, A Strategic Approach*, 12th Edition. You are given a box for each step within which to type:

1. Situation Analysis
 - Current organizational mission
 - Current ownership and management alternatives
 - Current goods/service category
2. SWOT Analysis
 - Current strengths
 - Long term strengths

- Current weaknesses
- Long term weaknesses
- Current opportunities
- Long term opportunities
- Current threats
- Long term threats

3. Objectives

- Sales
- Profit
- Positioning
- Satisfaction of publics

4. Identification of Customers [NOTE: Normally, one of these approaches would be selected for your plan.]

- Mass marketing
- Concentrated marketing
- Differentiated marketing

5. Overall Strategy

Controllable variables

- Goods/service strategy
- Location strategy
- Pricing strategy
- Promotion strategy

Uncontrollable variables

- Consumer environment
- Competitive environment
- Legal environment
- Technological environment

6. Specific Activities

- Daily and short-term operation
- Responses to environment

7. Control

- Evaluation
- Adjustment

Fully Worked-Out Sample Plan

To better help you understand the intricacies of the strategic planning process, we present one full sample plan based on the template. This sample plan takes you through all of the steps noted above. The plan involves an independently-owned high-fashion ladies clothing store (which is highlighted in Table 3-6 on page 75).

Fully Worked-Out Sample Plan

Nine scenarios are laid out for you and included in one PDF file. Your professor may assign one or more of these scenarios for you to use in conjunction with the Strategic Planning Template. You may also be assigned a scenario that does not appear in this file, based on your professor's approach to retail management.