

Fuchsia Shortcuts™ Plan to Make a Difference

In order to fulfill our mission to bring you creative, thorough marketing strategies that make a difference, we've applied our core ethos of **process + creativity = contribution** to develop Fuchsia Shortcuts. These interactive worksheets are part of our Strategic Planning Series consisting of tools designed to take you through the strategic planning process logically and simply.

We've viewed dozens of strategic planning books, systems, and web sites. While all useful, educational, and insightful, some were not practical, easy to use, or affordable. Because Fuchsia Focus works primarily with credit unions and small businesses, we decided to develop our own.

The worksheets are designed to help you focus on one quick element at a time, keeping you from becoming overwhelmed by research and data, and to stay honed in on what matters most – those things that make a difference to your business, from the inside or out, and that which you plan to do something about.

How to Use Fuchsia Shortcuts

1. **Save the worksheet to your drive.** This will ensure all of your input is saved as you work.
2. **Open your saved version** using Adobe Reader® or Adobe Acrobat® and begin on the first page. Hover over any field for a title, description, or details about what goes in that field.
3. **Click in the field and start typing.** Most fields will scroll to hold as much content as you wish to enter, however, only visible text will print. Our advice is to keep it short. The idea is to stay focused on what matters, so the sizes of the fields available are intentionally limited.
4. **Tab to the next field.** Tabbing is set up to take you logically step-by-step through the document one field and one page at a time. In some cases, for example, in fields that are names of markets or segments, we've copied the field to other pages so that you don't have to back up, take notes, or try to memorize the work you've done and to help you move faster through the important content.
5. **Save frequently!** And print if you must, but try to be eco-conscious and print only if necessary. We recommend copying and pasting your final summaries from each section into your final planning document. You will see this noted within the worksheet. Of course, you can include additional information from your analyses in your final plan, such as charts, tables, graphs, or narrative of specific characteristics or data points, but do so only when it adds value.
6. **Be flexible:** These worksheets are organized based on our experience in researching and utilizing the planning process and are designed to help ensure you think through everything. However, the topics within each analysis are flexible; don't worry about having everything in the 'right' place. The goal is to uncover and document critical issues to be addressed, not on having a perfectly organized plan.

If you would like help: If you are short on time or resources, we will be happy to complete any or all of these analyses for your credit union or small business. Contact us for a quote and we will turn your quote and your project around quickly and effectively.