SISTEMA DE
PLANIFICACIÓN
ESTRATÉGICA

SPE
DGRV
digital

Strategic Planning System (SPE)

A tool that facilitates the development of strategic and operational planning for cooperatives.

UN BENEFICIO
PARA TODOS
Las cooperativas

DGRV
Die Genossenschaften

GOALS

1

Document the planning process.

2

Visualize the future and purpose of the entity (strategic vision) to ensure long-term institutional sustainability.
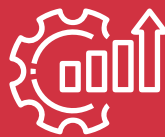
3

Implement planning as a management style and approach.

4

Encourage corrective actions and continuous improvement based on quantitative indicators.

5

Conduct monitoring and evaluation as a systematic activity.

CONTENT

1. Securities

2. SPE

3. Follow-Up

4. Reports

5. Tools

The Strategic Planning System (SPE) is based on the Balanced Scorecard (BSC) framework. It enables institutions to develop, plan, implement, and monitor compliance with their strategies.

01. SECURITIES

1
GENERAL ADMINISTRATION

Manage the entity's data, including the creation of areas, positions, offices, and planning groups.

2
ROLES AND USERS

Configure roles tailored to the institution's specific needs and assign them to users who will interact with the tool.

3
CONFIGURATION

Develop strategic plans, define balanced scorecard metrics, and establish strategic perspectives to align with institutional goals.
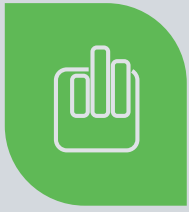
02. STRATEGIC PLANNING SYSTEM (SPE)

The SPE tool follows a structured process in three sequential phases:

1

ANALYSIS AND DIAGNOSIS PHASE

Conduct **SWOT Matrix** analysis, including:

- External Matrix using the PESTEL methodology.

- Internal matrices by perspective.

- Automatic prioritization of key factors.

Surveys: covering governance, organizational climate, satisfaction, and internal processes.

2

STRATEGIC PHASE

- Define the institution's **vision, mission, values**, cooperative principles, and institutional philosophy.

- Set objectives, including indicators, goals, and alignment to the strategic map.

- Develop strategies by cross-referencing variables to create actionable plans.

3

OPERATIONAL PHASE (PROJECTS)

This phase focuses on short-term action plans to execute strategies and achieve objectives. Key modules include:

- POA (Annual Operational Plan) Portfolio: Managing operational projects.

- Design of Operational Plans (POA).

03. FOLLOW-UP

Monitor the progress of goals, indicators, objectives, activities, projects, and strategies to ensure timely corrective actions and improvements.

04. REPORTS

Generate strategic planning reports and monitor them by period or specific date in formats such as PDF, XLS, XLSX, and DOCX.

Access a dynamic strategic map with scores at both the strategy and global strategic objective levels.

05. TOOLS

The system provides additional tools for analysis, diagnosis, and competitive positioning, including:

CANVAS: Develop and analyze business models.
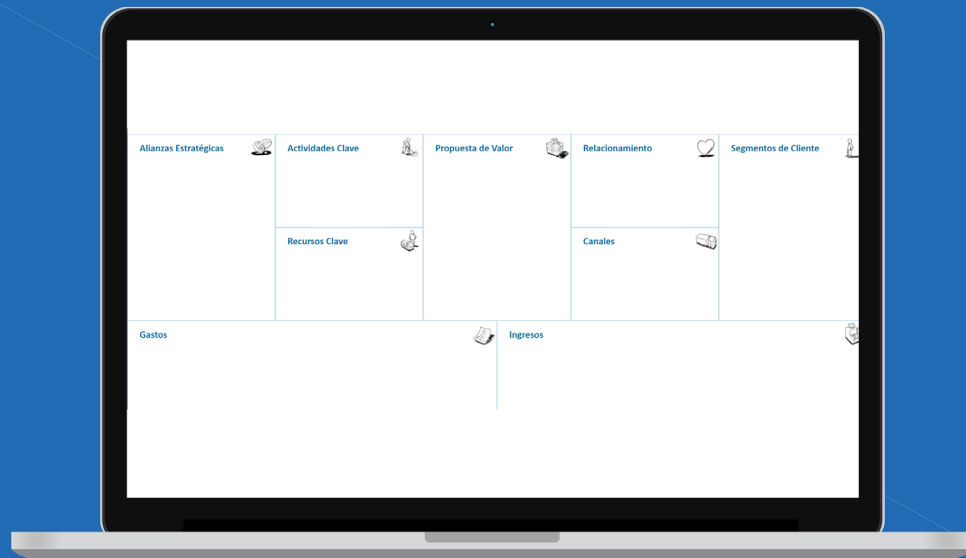
Competitive Profile: Assess and visualize competitive positioning.

SPE SMART is an integrated module that allows institutions to manage projects directly from mobile devices (Android) using the agile KANBAN methodology. This feature enables institutions to innovate in operational execution.

METHODOLOGY

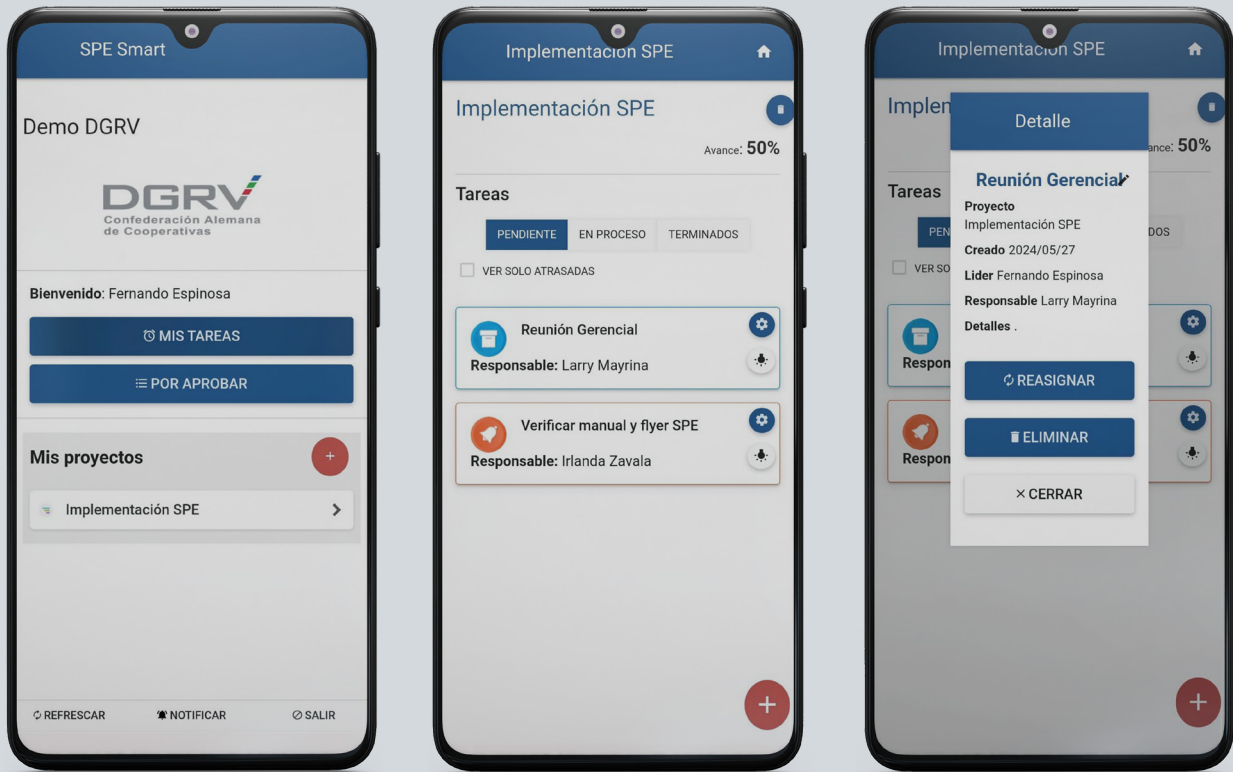The **Balanced Scorecard (BSC)** provides quantitative indicators across institutional perspectives (growth and learning, internal processes, customer/partner/market, and financial). It bridges the gap between a cooperative's mission-vision and its daily operations. Key benefits include:

1

The CMI is a holistic tool that fosters synergy across the entire organization.

2

Integrate information across all business areas to achieve synergy.

3

Align organizational objectives with employee goals to foster motivation, training, and continuous improvement.

4

Facilitate redesign of strategies when necessary.

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