

STRATEGIC PLANNING TOOL

MISSION	VISION	VALUES
---------	--------	--------



of EMPLOYEES

WE ARE KNOWN FOR...



REVENUE

WE ARE KNOWN BY...

MARKET DEMAND

←

→

Low High

WE NEED TO...

START

STOP

CONTINUE

MARKET REACH

- Local
- Regional
- National
- Global



of EMPLOYEES

WE ARE KNOWN FOR...



REVENUE

WE ARE KNOWN BY...

MARKET DEMAND

←

→

Low High

WHAT ARE YOUR NEW...

STRENGTHS

THREATS

OPPORTUNITIES

MARKET REACH

- Local
- Regional
- National
- Global

STRATEGIC SNAPSHOT

TODAY DATE / /

STRATEGIC SNAPSHOT

3 YRS FROM NOW DATE / /

OBJECTIVES How will you achieve your goals?

Which are your TOP THREE? Notate them. *Keep in mind* – What will have the greatest impact on achieving your MVV & improving marketing position?

VISUALIZATION EXERCISE

Close your eyes, it's 3 years from now, your strategic plan has actualized. Visualize your company, the team, the market, financials – meeting all goals. Take several deep breaths. Write down what arises in your body from this visualization (feelings, emotions, body posture). Keep your notes to look back on. Use this exercise to motivate you.

TOP 3 OBJECTIVES	WHAT ARE THE KPIS? <small>Key Performance Indicators (KPI) that measurable when your objective has succeeded</small>	WHO <small>is responsible</small>	WHEN

EXECUTE, MANAGE, & REVIEW CHECKLIST Put due dates & schedule meetings now!

- Communicate the Strategic Plan
- Develop a KPI dashboard and communicate KPIS
- Set up regular check-ins with individuals who are responsible for KPIS
- Schedule quarterly reviews – discuss which KPIS are being met & adapt
- Schedule annual review – What needs to Start, Stop, & Continue to meet objectives?

