

Strategic Planning template:

1. Where are we now?

Define the market you operate in and the company position within it					
SWOT (<i>Strengths, Weaknesses, Opportunities and Threats</i>) [INTERNAL ANALYSIS]	PESTLE (<i>Political, Economic, Social, Technological, Legal and Environmental</i>) [EXTERNAL ANALYSIS]				
<table border="1"><tr><td>Strengths</td><td>Weaknesses</td></tr><tr><td>Opportunities</td><td>Threats</td></tr></table>	Strengths	Weaknesses	Opportunities	Threats	
Strengths	Weaknesses				
Opportunities	Threats				

2. Vision Mission Values Purpose and Ethos

Work through these to help create a reference point for the rest of the process.

Mission: This should be unchanging, the reason that you have set up the company, it should be the change you are trying to make and should remain constant as long as the company exists. This mission should form the basis of your Purpose statement

Purpose: Your purpose statement is an outward facing statement to let your stakeholders know what your purpose is for the company. It should be short and sell your 'why' as an organisation.

Vision: Your vision should be how you are aiming to get to the end point of your strategic plan, it should shape the end point of this section of the journey but will change as the strategy changes. It should always be coherent with the mission.

Values: Your values are what you expect all staff to use in their work, they are a set of overarching value statements that help your employees to understand the vision and mission. They should be tied to appraisals, check ins and should be common knowledge and practised daily so need lots of reinforcing!

Ethos: The ethos is what underpins the values, it is the principle elements of how you do business and can include elements such as core approaches, environmental aims or ethical practises at the heart of all you do.

3. Goals and Objectives

Personal	Business
5-10 Years	5-10 Years
3-5 Years	3-5 Years
18m-3 Years	18m-3 Years

Work backwards from your end goals in 10 years. Your personal aims should feed into your business goals. Try and be specific on numbers such as profit margins, profit amounts, turnover, staff levels, number of sites etc.

4. Strategies and Planning

From 3 months to 18 months your planning should be more thorough, a rolling 18 month plan should be created that provides a provisional idea of your strategic aims, then a quarterly planning process should make the plans more concrete until the active or first quarter (the actual 3 months you are going into) becomes a solid promise with set plans and actions.

5. Communicating the plan

The communication should be wide and varied to allow every stakeholder the best chance of seeing and understanding it. Typically a shortened version of the strategic plan with headline figures and outcomes is useful. It is also useful to break the strategic plan into a series of objectives to provide annual focus and a set of points to build oversight and accountability from. It is really important to communicate the 'why' and to have your purpose statement and values well understood.

6. Close the loop

- Accountability documents
- Set expectations for all roles
- Review points for all processes
- QA processes
- Gap Analysis
- KPI/OKR/Dashboard metrics
- Reporting

KEY: It is really important wherever you have identified an assumption you have made in your planning (ie through SWOT and PESTLE) you need a process for monitoring this to ensure your assumptions were accurate and haven't created an issue in your strategy.

7. Touch points

Build metrics for tracking your strategic plan goals, mission vision values etc into departments through touch points;

HR- eg, training and appraisals

Marketing- eg, the why and position in industry, CSAT scores, stakeholder engagement

Management- eg, communications are consistent, training and development working, pipeline and succession planning in place, key person analysis etc.