

YEARLY STRATEGIC PLAN

TEMPLATE



Purpose Statement:

Vision:

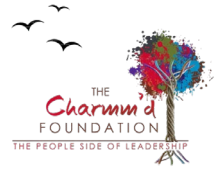
Mission:

Core Values:

What are your organization's core values and their definitions?

YEARLY STRATEGIC PLAN

TEMPLATE



Sandbox:

Geographic area served

Target customer segments

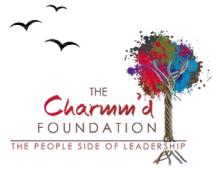
Products and services provided

Value Proposition:

Targeted toward potential customers, this is a clearly defined statement that is designed to convince customers that one particular product or service will add more value or better solve a problem than others in its competitive set.

YEARLY STRATEGIC PLAN

TEMPLATE



Strategic Anchors:

2-3 things your organization does which are not unique, but the way they are crafted together to make your organization different and give you a competitive advantage.

What really matters to (insert your organization name):

What experience do you want to provide your clients? How do you want them to feel after interacting with your organization?

What do you want them to do because of the services/support they are receiving?

YEARLY STRATEGIC PLAN

TEMPLATE



How will their lives be better?

What we won't compromise on:

This list can help prevent mission drift, especially when looking at adding new programs/services or funding opportunities that might cause you to veer outside of our defined mission. This requires clarity of mission and discipline to say no.

SWOT (Strengths, Weaknesses, Opportunities, Threats):

List no more than your top 5 for each.

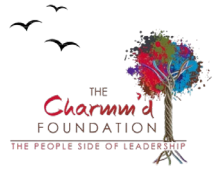
Strengths (Internal):

1:

2:

YEARLY STRATEGIC PLAN

TEMPLATE



3:

4:

5:

Weaknesses (Internal):

1:

2:

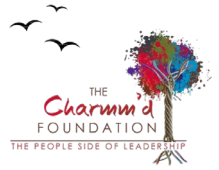
3:

4:

5:

YEARLY STRATEGIC PLAN

TEMPLATE



Opportunities (External):

1:

2:

3:

4:

5:

Threats (External):

1:

2:

3:

YEARLY STRATEGIC PLAN

TEMPLATE



4:

5:

Overarching Goals:

Think BHAGs (Big Hairy Audacious Goals): 10 – 30 years out

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goals for the current year:

List your top 3- 5.

*These are **Specific Measurable, Actionable, Realistic, and Time-bound.***

Goal 1:

YEARLY STRATEGIC PLAN

TEMPLATE



Goal 2:

Goal 3:

Goal 4:

Goal 5:

Quarterly Team Objectives:

Suggest having 1-2 each quarter.

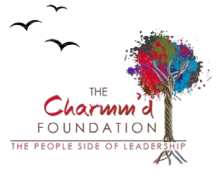
Revisit them at the end of each quarter and make changes accordingly.

Have each staff member in your organization develop his/her own objectives/project plans that reflect what they will do, specifically, to address the team objectives (which are tied to the yearly goals).

Q1 - 1st Objective:

YEARLY STRATEGIC PLAN

TEMPLATE



Q1 – 2nd Objective:

Q2 – 1st Objective:

Q2 – 2nd Objective:

Q3 - 1st Objective:

Q3 – 2nd Objective:

Q4 - 1st Objective:

Q4 – 2nd Objective:
