

(Name of Organization)  
Strategic Plan

Preliminary Components

MM/DD/YYYY

**Project Team:** (List full names of team members)

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# History and Background

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**One page**. Provide a historical perspective about the organization.

What you might include:

- Origins of organization
- Reason for being
- Relevant information about why, how, who, when
- Leadership influences
- Etc.

# Business Overview

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**One page.** Provide a highly focused description of the organization as an enterprise, institution or business.

What to include:

- A description of the core business(es) of the organization;
  - What does it do
  - For whom
  - How does it compare to others in the field
- Numbers of employees in the organization
- How it is organized – organizational chart can be included
- Highlights and distinctive features
- This is a descriptive statement

# Organization Chart

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# Financial Overview

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# Strategic Plan Overview

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**One page.** This is the summary, provide these key components on this one page.

**Vision**

**Values**

**Mission**

**Goals**

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

Goal 6:

Goal 7:

# Environmental Assessment

- PEST
- SWOT



# Environmental Assessment: Summary

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**One page**. Summarize the highlights, themes, patterns, conditions and implications of the Environmental Assessment.

Describe what you concluded, the implications, and how it is relevant to developing and influencing the strategic planning process.

Draw from the following:

- PEST
- SWOT
- Life Cycle
- Benchmarking

# Environmental Assessment: PEST Analysis

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Political	Economic
<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>

# Environmental Assessment: PEST Analysis

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Social	Technology
<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>

# Environmental Assessment: SWOT Analysis

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<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>

# Environmental Assessment: SWOT Analysis

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Opportunities	Threats
<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>

# Environmental Assessment: Force Field Analysis

Factors that will block/inhibit development of the strategic plan

Factors that will support/help development of the strategic plan

<b>Blocking Factors</b>	<b>Supporting Factors</b>
<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>	<ul style="list-style-type: none"><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li><li>•</li></ul>

# **Environmental Assessment: Industry/Organization Life Cycle**

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# Environmental Assessment: Benchmark Analysis

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**One page.** Describe some peer organizations in your field or industry. . Some of this information may be identified in the PEST/SWOT analysis, however use this context to be more specific.

You might include:

## **Peers**

- Is there an industry association that you are part of? What is its significance?
- How do you rate in size, scope, complexity when compared to peer organizations?
- Identify relevant issues, challenges etc. that may be evolving from peers.

## **Competitors**

- Who are your major competitors?
- How do you rate on various performance metrics?
- How will you compete?
- What are your core strategies to distinguish or differentiate yourself from competitors?
- Etc., etc.



# **Developing the Vision, Values, Mission**

# Vision Development

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**One page.** Present the vision statement in draft form.

**Vision:**

(State the vision)

Provide a brief (2-5 paragraphs) description of how the vision was developed; Did you build on a previous vision? Look at other organizations? Develop a new vision? Who was involved, etc.?

How does your vision development align to the criteria presented in the workbook?

# Values Development

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**One page.** List the value statements (words /phrases) in draft form.

**Values:**

(List the values)

Provide a brief (2-5 paragraphs) description of how the values were developed; Did you build on previous values? Look at other organizations? Draw from the vision? Who was involved, etc?

How does your value development align to the criteria presented in the workbook?

# Mission Development

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## **Mission:**

Provide a brief (2-5 paragraphs) description of how the mission was developed; Did you build on previous missions? Look at other organizations? Draw from vision? etc. Who was involved?

How does your mission development align to the criteria presented in the workbook?

# Vision, Values, Mission Comparisons

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This is one page where you list three to five visions, values, missions from other organizations in your field, industry, etc.

## **Vision**

List **visions** with name of organization / company

## **Values**

List **values** with name of organization/company

## **Mission**

List **missions** with name of organizations/company

# **Key Result Areas** **Goals and Strategies**

# Key Result Areas

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This is one page where you list the Key Result Areas for the organization based on your Environmental Assessment, research etc.

Describe a few sentences why this area is a KRA. For Example...

## **Financial**

Revenues generation, cost cutting, fiscal oversights are critical to the organization's stability and long term success.

## **People/Relationships**

Quality of communication and trust levels internally and externally are important to ensure an efficient and successful performance.

## **Facilities**

Upgrading and new construction is critical for us to keep up with our competitors.

**The KRA's will be transformed into specific goals.**

## Goals - Preliminary

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One page where the KRA is listed followed by an explicit goal statement.

### **Example**

KRA #1– Financial

**Goal #1:** Provide comprehensive financial leadership, oversight and fiscal responsibility.

KRA #2- People/Relationships

### **Goal #2**

Attract, retain and develop outstanding people who fit our culture of teamwork and candor.

### **List 3 to 7 Goals**



# Goals and Strategies

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This will be 2-3 pages where you list each goal with 3-5 strategies for achieving each goal.

You **do not** have to identify the strategies for this project at this time but I am providing the format page for your information

## **Example**

### **Goal # 1: Achieve strong financial performance**

Strategy 1: Cut costs in each department by 10%

Strategy 2: Use incentives for sales people

Strategy 3: etc.

### **Goal #2:**

Strategy 1:

Strategy 2:

Strategy 3:

## **ETC.**

# Strategic Plan Project- Summary Analysis

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## Project Team Evaluation (address these as best you can)

- Identify who will be accountable for implementing the plan. At what level?
- How will the organization measure/ monitor progress?
- When will the plan be revised? (Monthly, Quarterly, Semi-Annually)
- How will the launching and implementation of the Strategic Plan be communicated?