Strategic Plan Worksheet

BUSINESS VISION	
Core Values & Beliefs	
Core Purpose	
Core Strategic Goal BHAG	

ANNUAL STRATEGIC GOALS	
Year 3	
Year 2	
Year 1	

FOCUS AREAS & OBJECTIVES (FAO)	
FAO 1	
FAO 2	
FAO 3	
FAO 4	

FAO #1 TACTICS		
	Tactic	KPIs & Tasks
FAO Tactic 1		
FAO Tactic 2		
FAO Tactic 3		
FAO Tactic 4		
FAO Tactic 5		

FAO #2 TACTICS		
	Tactic	KPIs & Tasks
FAO Tactic 1		
FAO Tactic 2		
FAO Tactic 3		
FAO Tactic 4		
FAO Tactic 5		

FAO #3 TACTICS		
	Tactic	KPIs & Tasks
FAO Tactic 1		
FAO Tactic 2		
FAO Tactic 3		
FAO Tactic 4		
FAO Tactic 5		

FAO #4 TACTICS		
	Tactic	KPIs & Tasks
FAO Tactic 1		
FAO Tactic 2		
FAO Tactic 3		
FAO Tactic 4		
FAO Tactic 5		

Milestone

A key event or action in your strategic plan that will mark a significant stage of progress. Milestones can also serve as a test of the efficacy of your strategy.

Milestone 1	
FAO Tactic	

Milestone 2	
FAO Tactic	

Milestone 3	
FAO Tactic	

Milestone 4	
FAO Tactic	

Milestone 5	
FAO Tactic	

Milestone 6	
FAO Tactic	

90-Day Goals & Action Plans

The **90-Day Goals and Action Plans** are where the organization achieves momentum in its Strategic Plan. To execute and review every 90 days breaks down the annual goal into manageable chunks. It allows the business to assess and pivot depending on the success rate of achieving quarterly benchmarks.

An **Action Plan** is a way to make sure your organization's vision is made concrete. It describes how your team will use its strategies to meet its objectives. An action plan consists of a number of action steps or changes to be brought about in your business. Action plans can accomplish weekly KPIs.

Q1 Goals	Q2 Goals	Q3 Goals	Q4 Goals
• Secure and sign 3 new national or state political races with at least $40k book value.			

Weekly Tracking

The key to 100% exceptional execution of a strategic plan. When you track weekly you can course correct easily and ensure goal and objective attainment.

IMPORTANT MUST-HAVES AND TO DO

- ☐ Each FAO Tactic Has an Owner.
- ☐ You Have a Tracking Tool for Weekly Tracking.
- ☐ You Have Weekly KPIs attached to each Quarterly Goal.
- ☐ You Have Created an Action Plan or PlayBook.

On track

Not on track

At risk

Likely to Exceed

ADDITIONAL STRATEGIC PLANNING TOOLS

Company SWOT Analysis

STRENGTH	WEAKNESSES	OPPORTUNITIES	THREATS

PESTEL ANALYSIS

One important tool that executives can rely on to organize factors within the general environment and to identify how these factors influence industries and the firms within them.

Political segment centers on the role of governments in shaping business. This segment includes elements such as tax policies, changes in trade restrictions and tariffs, and the stability of governments

Economic segment centers on the economic conditions within which organizations operate. It includes elements such as interest rates, inflation rates, gross domestic product, unemployment rates, levels of disposable income, and the general growth or decline of the economy

Social factors include trends in demographics such as population size, age, and ethnic mix, as well as cultural trends such as attitudes toward obesity and consumer activism

Technological segment centers on improvements in products and services that are provided by science. Relevant factors include, for example, changes in the rate of new product development, increases in automation, and advancements in service industry delivery

Environmental segment involves the physical conditions within which organizations operate. It includes factors such as natural disasters, pollution levels, and weather patterns

Legal segment centers on how the courts influence business activity. Examples of important legal factors include employment laws, health and safety regulations, discrimination laws, and antitrust laws