

# yearly strategic plan



The process of planning and goal setting comes in steps – rather like this brilliant pyramid which simply explains, start with the values of how you expect to behave in client service. Then clarify why you are in the business to provide what core service?

Setting of targets is always challenging but ultimately without a target measure how can you measure progression? Goals clarification if what is it your end goal achievement is? How to get their will take a mix of action steps, progressive parts of the organization working together to deliver the goal? The timetable that this process should confirm to is the estimated time required to deliver goals...remain flexible.



## yearly strategic plan

Organization Name	
Your Name	
Date	

1. Core values / beliefs (Should/Shouldn't) of BIZ?	2. Purpose (Why) of business	3. Targets (3-5 yrs) (Where)	4. Goals (1 yr) (What)																																																								
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## Opportunities to exceed plan

1	
2	
3	
4	
5	

## Threats to making plan

1	
2	
3	
4	
5	

### 5. Actions (qtr) (How)

Qtr. #	
Revenues	
Profit	
Mkt Cap	
Gross Margin	
Cash	
A/R Days	
Inv. Days	
Rev./Emp.	

#### Rocks Quarterly Priorities

1		
2		
3		
4		
5		

Prioritize your Rocks.

**1 or 2 Critical #s**

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### 6. Theme (Qtr / Annual)

Deadline	
Measurable Target/Critical #	

**Theme Name**

**Scoreboard Design**  
Describe and/or sketch your design in this space.

**Celebration/Reward**

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### 7. Your accountability (Who / When)

Your Quarterly Priorities      Due

1		
2		
3		
4		
5		

