



## The Strategic Plan

# STRATEGIC PLAN

DESCRIPTIVE NAME OF THE PROJECT

### Prepared by

List names of  
All the people  
Who prepared this plan

### *Strong Point Strategy*

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# VISION

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DESCRIPTIVE NAME OF PROJECT

Our vision of our future is ...

Give an expression of the vision here after you have read and discussed what is meant by 'vision' in participatory strategic planning. Do this when you are ready to, as early in the planning process as you can.

# PLANNING TO PLAN

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**Our Project**

Write a descriptive title of the project

**Our commitment**

A statement that the Executive Officer or Coordinator will provide time and resources needed to complete the participatory planning cycle

**Our planning team**

List the names and positions of the people who will make the plan

**The stakeholders**

List the people, groups and organizations who may be affected by this plan

**Time for planning**

When will the planning team meet?

**Place for planning**

Where will the planning team meet?

## **Stake holder-team relationships**

Draw a diagram connecting each stake holder to the planning team on a piece of paper and attach it to the strategic plan at the end of this part..

# ENVIRONMENTAL MONITOR

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This Environmental Monitor should be copied and used from time to time during the planning cycle.

**Date**

**Global environment**

Are there any new technologies, or international events that may affect this project

**National and State events**

Any political events, and policies, economic changes or other elements in the national or state environment.

**Social and cultural environment**

What are the social and cultural expectations, events and changes which might affect the project?

**Industry or service sector**

Trends and events in the industry or service sector

**Competitive environment**

Description of similar organizations or projects, and monitoring their actions.

**Local environment**

Local events, history, geography, economy, politics, interests, activities etc.

**Internal monitor**

What happens in the organization, project and planning team.

# IMMEDIATE ACTION PLAN

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This form should be kept and used when the planning process reveals a need for immediate action. Always use a copy of this form, and keep the original so you can take other copies to use later.

<b>Date</b>	Date the form is filled out
<b>Gap identified</b>	During the planning process differences between what is and what should be will be uncovered
<b>Urgency</b>	If action is needed before the end of planning, when is action needed
<b>Action plan</b>	What you think should be done
<b>Responsibility</b>	Who will be responsible for application
<b>Commitment</b>	Executive Officer or Coordinator approves of action
<b>Action taken</b>	Report of what is done
<b>Outcome</b>	Report of what happened after the application

# CULTURE SCAN

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**Customers**

Brief description of the culture of service users

**Organization**

Brief description of the culture of the organization

**Local  
community**

Brief description of cultures in the local community

**Competitors**

Notes on cultures of other service providers

**Planning team**

Cultural background of each member of planning team

**Plan**

Implications of the cultural context for the plan



# VALUES SCAN

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## Members of planning team

Name	Personal values
Each member of the planning team	lists his or her own values
	use the tab key to add more rows

## The stake holders

Stake holder	Values
List each main stake holder	List the values of each (if known)
	Use statements made by stake holders when possible

## The Organization

Name of the Organization	Stated philosophy, principles or values
	Copy or attach a written statement if one exists
Source	

## The Project

Name of the Project	Statement of shared values
	Type in a statement prepared by the planning team in consultation with others

# PURPOSE FORMULATION

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The word "purpose" is often preferred to the word "mission". Another word preferred by stake holders may be used. Answer each of five questions, and then combine the five answers into one statement of purpose.

**1. What**

What services will the project offer?  
What functions will the project perform?

**2. Who**

Who are the people who may use this service?  
For whom will the project perform this function?

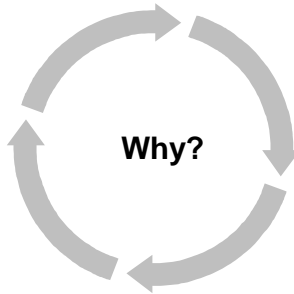
**3. How**

What will the project offer to meet this need?

**4. Why**

What are the reasons for the project?  
Why will the project exist?

**What?**



**How?**

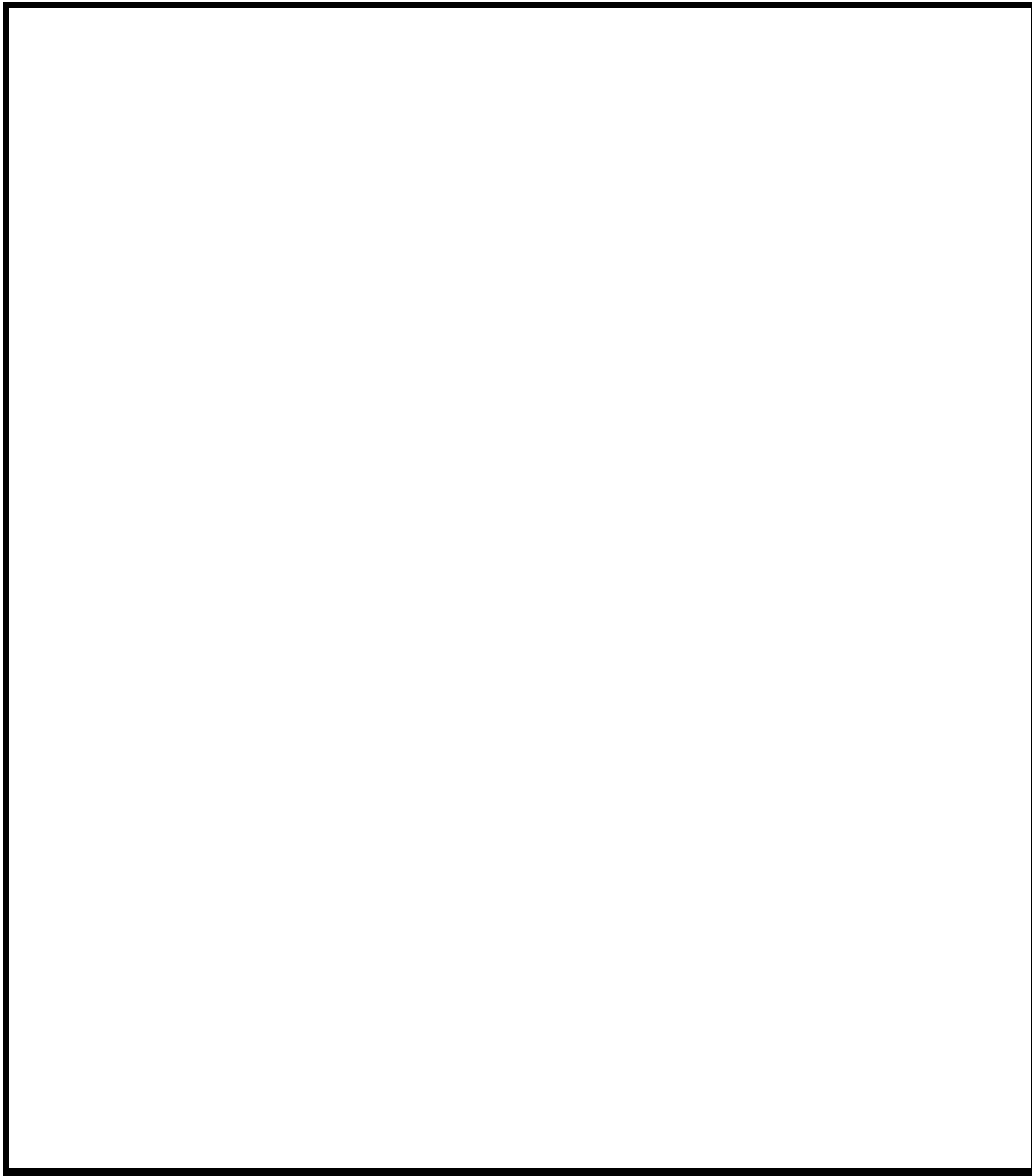
**Who?**

**Driving forces**

<b>Services</b>		what will we do
<b>Customers</b>		who will use our services
<b>Techniques</b>		what methods will we use
<b>Cost control</b>		how we can afford to do it
<b>Operations</b>		how we can do it
<b>Distribution</b>		how we will sell or offer our services
<b>Resources</b>		resources we can make use of
<b>Rewards</b>		what stake holders will get
<b>Distinctive competency</b>		What makes our project different from others?

# STATEMENT OF PURPOSE

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# GOALS & OBJECTIVES

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Copy the template, and fill it out for each Goal. Objectives will be formatted as a numbered list automatically.

**Goal**

Type your goal here

**Objectives**

1) First objective

**Goal**

Type your goal here

**Objectives**

1) First objective

# STRATEGIC MODEL

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- Service**
- 1) List the service or services ('Lines of Business') which the project will provide for the community.
  - 2) The computer will generate a new item in a numbered list when you press the 'Enter' key.

## Success indicators

- Activity**
- SUCCESS INDICATORS
- 1) Select copy and paste a copy of this box (with its title) for each major activity in your list.
  - 2) Replace the title 'ACTIVITY' with the name of an activity from the list.
  - 3) In this box list the indicators you will use to track progress in that activity.

## Broad strategies

This is the heart of the strategic plan. List the strategic thrusts which are the most important things you will do to achieve your vision.  
List a few broad strategies here. The detail comes later.

## Shared understanding

What common understanding do the members of the project team need to create these services, meet the success indicators and implement these strategies?

## Project Culture

What kind of culture is needed in the project team to achieve this success? (refer back to 3).  
What do you need to do to achieve and maintain this culture in the project team?

# SWOT ANALYSIS

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I N T E R N A L	<b>Strengths</b>	<b>Weaknesses</b>
E X T E R N A L	<b>Opportunities</b>	<b>Threats</b>

# GAP ANALYSIS

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Copy the following table, and fill a copy out for each service or activity listed in the strategic model.

Under **SITUATION** briefly describe where we are at now.  
 Under **OBJECTIVE** describe where you would like to be.  
 In the **ACTION** box write what you intend to do about it.  
 Copy what you write in the **ACTION** box into a copy of the Action Plan.

<b>Service or Activity</b>	
<b>Situation</b> (current state – environment)	<b>Objective</b> (future state – desired outcome)
<b>Action</b> (how to get from here to there)	



# ACTION PLAN

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<b>Objective</b>

Action	Who	When	Outcome

Copy this page, and use it many times in planning and implementing action to achieve your vision. For each action, name the person responsible for achieving the coordination of that activity. Identify the date the person is to report on progress. Make a brief note of the outcome when the report is made, or the date for expected completion.

