

**Company Name**  
**Strategic Plan Recap**

**Executive Summary**

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**Celebrate**

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SWOT Scan

Strengths	Weaknesses
•	•

Opportunities	Threats
•	•

### PESTLE Trend Analysis

What is happening in the world around us that is going to shape the future environment of our organization?

<b>Political</b>	•	•
<b>Economic</b>	•	•
<b>Social</b>	•	•
<b>Technological</b>	•	•
<b>Legal</b>	•	•
<b>Environmental</b>	•	•

### 3 Year Vision

Where do we want to go?

Aligned Team Vision **YEAR**

### Vision Points

1.

### 3 Year Mission

What is our purpose?

**Aligned Team Mission YEAR**

Who are we? (Adjectives used to describe ourselves)

1.

What do we do? (Benefits versus Features)

1.

Who do we do it for? (Our main customer)

1.

## Values

Important questions for value reshaping:

- What are the impacts if we reward non-ideal values?
- What are the impacts when people live our ideal values?
- What specific behaviors can be demonstrated to ensure your values move from implicit to explicit?
- What are the benefits of reshaping your values in your organization?
- How can we reshape the values throughout our organization?

<b>Current Values &amp; Behaviors</b> Good, not-so-good, or neutral	<b>Desired Values &amp; Behaviors</b> What do we want to replicate throughout our organizations to help us reach our vision?
•	•








### Priorities & Goal Setting

What are the areas of strategic focus for the next time period that can help mitigate some of the above risks and help you reach your 3-year vision? How are you going to measure success?

**Formula 1:** Go from BASELINE to TARGET by DATE  
**Example:** Increase revenue from \$1mil to \$4mil by Dec 31, 20XX

**Formula 2:** Do X ITEM to extent of TARGET by DATE  
**Example:** Contact 60 potential funders by Aug 30, 20XX

Strategic Priority #1  Priority  Champion	Strategic Priority #2  Priority  Champion	Strategic Priority #3  Priority  Champion
<b>Objectives &amp; Goals</b> <ul style="list-style-type: none"> <li>•</li> </ul>	<b>Objectives &amp; Goals</b> <ul style="list-style-type: none"> <li>•</li> </ul>	<b>Objectives &amp; Goals</b> <ul style="list-style-type: none"> <li>•</li> </ul>

**Implementation Plan**

What do you need to do first (urgent & important) to begin to move forward on your goals and priorities? You can continue to build on this action plan as you move forward with implementation.

<b>SP1: Champion:</b>		
Milestone/Deliverable	Responsibility	Target Completion Date
<b>Goal 1:</b>		
<b>Goal 2:</b>		
<b>Goal 3:</b>		

Goal 4		

<b>SP2: Champion:</b>		
Milestone/Deliverable	Responsibility	Target Completion Date
<b>Goal 1:</b>		
<b>Goal 2:</b>		
<b>Goal 3:</b>		
<b>Goal 4</b>		

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<b>SP3: Champion:</b>		
Milestone/Deliverable	Responsibility	Target Completion Date
<b>Goal 1:</b>		
<b>Goal 2:</b>		
<b>Goal 3:</b>		
<b>Goal 4</b>		

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### Communication of the Strategic Plan

What are you going to do to communicate and share your strategic plan throughout your organization?

- Who needs to know what, by when and to what extent?
- What communication structures do you need to put in place internally to be successful (ex: strategy meeting cadences, strategy review cycles)
- Where can you incorporate strategy discussions into existing communications?

Milestone/Deliverable	Responsibility	Target Completion Date
Meet as a strategy team to debrief and follow up on strategic plan		



## Appendix

### Takeaways & Reflections

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