



Strategic Planning Worksheet

Grow your business with purpose.

Strategic Planning Roadmap

The annual strategic planning process involves a lot of moving parts. This roadmap serves as a checklist to give you a bird's-eye view of the process to help you think through your goals and the milestones through the year to keep you on track. Keep this checklist on hand as you go through the accompanying worksheet below.

This chart assumes your fiscal cycle follows the calendar year, but you can adjust as necessary.

December

Establish/Revisit Purpose

Establish/Review progress toward BHAG

Set annual priorities for new year

Set quarterly TOPs and SMART objectives

Set Q1 (Jan. - Mar.) BIG 3 for individuals and teams

Establish meeting rhythm to ensure active follow up on all priorities and objectives

March

Review Q1 progress against TOPs and SMART objectives

Review progress against Q1 BIG 3

Set Q2 (Apr. - Jun.) BIG 3 for individuals and teams

June

Review Q2 progress against TOPs and SMART objectives

Review progress against Q2 BIG 3

Set Q3 (Jul. - Sep.) BIG 3 for individuals and teams

September

Review Q2 progress against TOPs and SMART objectives

Review progress against Q2 BIG 3

Set Q4 (Oct. - Dec.) BIG 3 for individuals and teams

December

Revisit Purpose

Review progress toward BHAG

Set annual priorities for new year

Set quarterly TOPs and SMART objectives

Set Q1 (Jan. - Mar.) BIG 3 for individuals and teams

Review Q2 progress against TOPs and SMART objectives

Review progress against Q2 BIG 3

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Turning your business vision into reality requires a healthy, realistic approach and a well-crafted path toward success. You need to think realistically about where your business is going and be flexible about your expectations. Setting concrete performance measures is a great idea, but you need to support them with a plan to achieve them.

Use this worksheet to assist you in creating a strategic planning process that will help your business survive and thrive.

Step 1: Identify the purpose of your business.

Every business needs a vision to guide and influence strategies and decisions. After all, if you don't know where you're going, you'll never get there.

1. What's your company's purpose?

2. What's your company's values?

3. What's your company's mission?

Step 2: Analyze results for continuous improvement.

In a SWOT+ session, everyone's voice is heard. It's a great way to celebrate successes, learn from mistakes, and move forward as a team. It's important that the facilitator of a SWOT+ session create a completely safe environment where honest input can be given and received openly.

Involve your team in a SWOT+ exercise

1. Accomplishments (30 minutes): Talk about all of the good things and create a positive vibe.

Tip: Reflect on the great work and results of the previous quarter. This is your chance to pat yourself and your team on the back for a job well done.

2. Lessons Learned (30 minutes): Include both the good and bad, "ah-ha" moments of the year.

Tip: Maintain constructive learning rather than allowing it to turn into a gripe session.

3. SWOT analysis: Strengths, Weaknesses, Opportunities, Threats (one hour): Strengths and Weaknesses are internal to the business; Opportunities and Threats are external. Spend up to 15 minutes on each item.

Tip: Move through these sections in order, but allow for a few additions to previous topics as people get more ideas.

4. Strategic Issues (30-60 minutes): This is the culminating step to identify the top three to five issues you are going to tackle this year or quarter. Based on the prior three steps, use this step to

capture strategic issues in this format: “How do we achieve X outcome, given Y situation or obstacle?”

Tip: The focus here is to articulate the core issues; don’t attempt deep problem solving at this point.

Step 3: Understand how strategy guides planning.

The foundation of a great strategy is leverage: use your organization’s strengths to gain an outsized return. With this in mind, what resources and capabilities can you leverage for maximum gain?

Define and leverage your strengths

1. List the three to five core strengths of your company.

2. What is your BHAG? BHAG: (pronounced BEE- hag)
Big Hairy Audacious Goal

3. List three to five key strengths you need to utilize to achieve your BHAG.

4. List three to five key strengths you need to develop in order to achieve your BHAG

Step 4: Involve and motivate your employees.

Involving your team in the strategic planning process increases their personal investment. This is powerful, because it drives organizational alignment and a higher probability of success.

Identify your own native genius

1. The Big 3: Define three key primary responsibilities that connect to your overall mission. Work with your team to create a Big 3 for each of your employees.
 2. How often will you review and track and measure your Big 3?
 3. Identify your native genius. Work with your team to identify the native genius of each employee.

Strategic planning is the link between a great idea and business success. In small business, a strategic game plan can help you do more than just survive. You can thrive—and win.

4. List three to five priorities you will focus on this year that will move you closer to your BHAG.
 5. List three to five TOPs/quarterly priorities that support your annual priorities. TOP: Tactical Operating Priorities
 6. For each quarterly priority, list five to 10 SMART objectives that will help you achieve your quarterly goals. SMART: Specific, Measurable, Achievable, Relevant, Time-Bound

Step 5: Establish a meeting rhythm for success.

Strategic planning isn't a one-time event. Once you've identified a strategy, it's crucial to stay focused. One of the best ways to do that is with a steady rhythm of productive meetings.

Create a meeting schedule that meets your objectives. For each, identify the key players who will need to be involved, the time necessary to complete your objectives, and any other essential items (such as meeting space).

	Key players	Time	Space	Other
Annually				
Quarterly				
Monthly				
Weekly				
Daily				

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