Strategic Plan Template

# Introduction

This strategic plan template helps you convert strategy into execution. It reflects practical insights from experienced operators: focus on a few priorities, attach measurable outcomes, and run a consistent review cadence. Use the table to connect objectives to KPIs, initiatives, owners, budgets, and risks.

# Executive Summary (Fill This In)

• Mission: [Why we exist]

• Vision (3–5 years): [The future we create for customers]

• Strategic Themes: [e.g., Growth, Product, Operations, People]

• Top KPIs & Targets: [e.g., Revenue +20%, Retention +10 pts]

# Step-by-Step Directions

1. Define your mission and a clear, customer-centric vision.

2. Diagnose reality with a short, sharp SWOT and a review of data trends.

3. Pick 3–4 strategic themes that concentrate resources where they matter most.

4. Write 1–3 SMART objectives per theme; tie each to a KPI with a baseline and target date.

5. List initiatives/projects that move the KPI; include milestones, owners, budgets, and dates.

6. Setup governance: monthly reviews, status (RAG), risk reviews, and a change log.

7. Communicate the plan broadly and connect it to team/individual goals (OKRs).

# Strategic Plan Table

| **Category** | **Details** |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Strategic Theme |  |  |  |  |  |  |  |  |
| Objective (SMART) |  |  |  |  |  |  |  |  |
| KPI / Metric |  |  |  |  |  |  |  |  |
| Baseline |  |  |  |  |  |  |  |  |
| Target & Date |  |  |  |  |  |  |  |  |
| Initiatives / Projects |  |  |  |  |  |  |  |  |
| Key Milestones |  |  |  |  |  |  |  |  |
| Owner |  |  |  |  |  |  |  |  |
| Start Date |  |  |  |  |  |  |  |  |
| End Date |  |  |  |  |  |  |  |  |
| Budget (CapEx/OpEx) |  |  |  |  |  |  |  |  |
| Resources / Headcount |  |  |  |  |  |  |  |  |
| Risks & Mitigations |  |  |  |  |  |  |  |  |
| Dependencies |  |  |  |  |  |  |  |  |
| Status (RAG) |  |  |  |  |  |  |  |  |
| Notes |  |  |  |  |  |  |  |  |