



**Strategic Plan**

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**Resource**

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## So You Need a Strategic Plan . . .

In the ever-changing world we live in, organizations often grapple with the challenge of navigating uncertainty while pursuing their long-term objectives. That's where strategic planning comes in. It's your road map to success.

A strategic plan is more than just a document; it's a compass that guides your organization's journey toward its goals. It's the result of thoughtful analysis and careful consideration, enabling you to allocate resources effectively and adapt to the dynamic environment in which you operate.

This template has been crafted to assist you in creating and implementing a strategic plan that will drive your organization forward. It offers structure, clarity, and actionable steps to help you make informed decisions, optimize resource allocation, and track progress as you work toward your objectives.

Whether you're a business leader, a nonprofit manager, a government official, or an aspiring entrepreneur, this template is your essential tool for crafting a strategic plan that adapts to the twists and turns of your journey. It's not just a static document; it's a dynamic companion on the path to a prosperous and sustainable future.

Let's get started!



## **Vision**

This is a concise and inspirational statement that outlines the organization's long-term aspirations and desired future state. It provides a clear picture of what the organization hopes to achieve.

## **Mission Statement**

Do you have a formal mission statement? Add it here. Ideally, your mission statement should be no more than 30 words and should describe the heart of your work. If you don't have a mission statement, get a feel for what other businesses use (for tone/clarity) and then summarize your core purpose as an entity here.

## **Core Values**

These are the guiding principles and beliefs that underpin the organization's culture and decision-making processes. Core values reflect the organization's identity and serve as a moral compass.

## **Goals & Objectives**

Think about clear and specific statements that outline what the organization aims to achieve in the long term. Goals are often broad and overarching, while objectives are specific, measurable, achievable, relevant, and time-bound (SMART).

## **SWOT Analysis**

Perform a comprehensive analysis of the organization's strengths, weaknesses, opportunities, and threats (SWOT). This step helps identify internal and external factors that may impact the organization's strategic direction.

## **Strategies & Initiatives**

These are the high-level plans and approaches used to achieve the defined goals and objectives. Strategies detail the overall approach, while initiatives are specific actions or projects designed to implement those strategies.

## **Key Performance Indicators (KPIs)**

Measurable metrics used to track progress toward achieving objectives, KPIs help in monitoring and assessing the effectiveness of the strategic plan.

## **Implementation Plan**

This detailed plan outlines the specific tasks, responsibilities, timelines, and resources required to execute the strategies and initiatives. It serves as a road map for turning the strategic plan into action.

## **Budget & Resource Allocation**

In this section, give an overview of the financial and resource requirements for implementing the strategic plan. This section provides insights into how financial resources will be allocated to support the initiatives.

## **Risk Assessment & Mitigation**

Provide an analysis of potential risks and challenges that might impede the plan's success. This section should include strategies for identifying, managing, and mitigating these risks.

## **Monitoring & Evaluation**

Describe a system for regularly tracking progress, measuring outcomes, and assessing the plan's success. This may include milestones, regular reviews, and a feedback mechanism to ensure the plan remains adaptive.

## **Communication Plan**

Discuss a strategy for keeping stakeholders informed about the progress and changes related to the strategic plan. Effective communication helps engage and align employees, board members, partners, and other stakeholders.

## **Timeline**

A timeline or schedule that outlines when each initiative is expected to begin and end helps in coordinating activities and ensuring that the plan stays on track.

## **Accountability & Responsible Parties**

Ensure that everyone knows their role in the plan's implementation by clearly defining roles and responsibilities for individuals or teams involved in executing the plan.

## **Other Pointers**

Don't forget to add the page numbers to your table of contents, if you have one, once you're done. (And adjust the footer to reflect your true "start" page.)

We've spaced sections out to get you started, but you're not limited by the space allotted. Adjust as necessary to answer the questions comprehensively.



# VISION

# MISSION STATEMENT

# CORE VALUES



# GOALS & OBJECTIVES

# SWOT ANALYSIS

# STRATEGIES & INITIATIVES

# KEY PERFORMANCE INDICATORS (KPIs)

# IMPLEMENTATION PLAN

# BUDGET & RESOURCE ALLOCATION

# RISK ASSESSMENT & MITIGATION

# MONITORING & EVALUATION



# COMMUNICATION PLAN

# TIMELINE

# ACCOUNTABILITY & RESPONSIBLE PARTIES