

Strategic Plan Outline

Strategic Planning Components

- Strategic Vision
- Who are We (mission, vision, history, core values)
- Primary/Overarching Strategic Objectives (no more than three)
- Strategic Themes/Guiding Principles
- High Level Performance Metrics (no more than five)
 - Baseline/Where are we today
 - Where will we be in three years
- Market/Operating Context and Environment
- High Level Strategies for Each Primary Objective
- Wild Cards
- Summary

Strategic Vision

This is a simple, aspirational statement about where the organization will be at some point in the future.

It is helpful to be audacious with the vision.

Who Are We?

- What we do/why we exist (mission)
- What we aspire to be (vision)
- What do we believe (top three of six stated values)

Primary Overarching Strategic Objectives

- These are high level strategic objectives.
- They are so high level, that there can only be two or three.

Strategic Themes/Guiding Principles

These are themes or principles that will guide the organization as it pursues the high level strategic objectives. Examples could things like:

- Collaboration/Teamwork
- Sense of Urgency...

Core/High Level Success Metrics

These are metrics that are central enough to the definition of success that everyone owns them and they merit identification. They must also be measurable and trackable. Some categories might include:

Financial

Customer Outcomes

Regulatory

Operational Strategies

This part of the strategic plan reflects specific operational plans or initiatives that will directly support achievement of each high level strategic objective.

Each objective has at least two or three supporting operational initiatives.

Priorities for the Coming Year

- This is an opportunity to align short term commitments to longer term strategies.

Wild Cards

- This is an opportunity for “crazy talk”—unedited “wild” ideas about what the organization could do given the resources, courage, etc.
- Generally speaking only one or two ideas from this section will survive future editing.

Summary

- This is a very brief, action oriented summary of the strategic plan: what will be accomplished, why it matters, etc.