

How to Write a Strategic Plan

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The Basics of Writing a Strategic Plan

The strategic planning process takes time, but the payoff is huge. If done correctly, your strategic plan will engage and align stakeholders around your company's priorities.

Strategic planning, also called *strategy development or analysis and assessment*, requires attention to detail and should be performed by someone who can follow through on next steps and regular updates. Strategic plans are not static documents — they change as new circumstances arise, both internally and externally.

Before beginning the strategic planning process, it's important to make sure you have buy-in from management, a board of directors, or other leaders. Without it, the process cannot succeed.

Next, gather your planning team. The group should include people from various departments at different levels, and the planning process should be an open, free discussion within the group. It's important for leaders to get input from the group as a whole, but they don't necessarily need approval from everyone — that will slow down the process.

The plan author is responsible for writing and putting the final plan together and should work with a smaller group of writers to establish and standardize the tone and style of the final document or presentation.

Sometimes, it's a good idea to hire an external party to help facilitate the strategic planning process.

“It often can be helpful to have a really good facilitator to organize and pursue strategic conversations,” says Professor John M. Bryson, McKnight Presidential Professor of Planning and Public Affairs at the Hubert H. Humphrey School of Public Affairs, University of Minnesota and author of *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*.



Bryson says the facilitator can be in-house or external, but they need experience. “You need to make sure someone is good, so there needs to be a vetting process,” he says.

One way to gauge a facilitator's experience is by asking how they conduct conversations. “It's important for facilitators to lead by asking questions,” Bryson says.

Bryson says that strong facilitators often ask the following questions:

- What is the situation we find ourselves in?
- What do we do?
- How do we do it?
- How do we link our purposes to our capabilities?

The facilitators also need to be able to handle conflict and diffuse situations by separating idea generation from judgement. “Conflict is part of strategic planning,” Bryson admits. “[Facilitators] need to hold the conversations open long enough to get enough ideas out there to be able to make wise choices.”

These outside helpers are sometimes more effective than internal facilitators since they are not emotionally invested in the outcome of the process. Thus, they can concentrate on the process and ask difficult questions.

A *strategic plan* is a dynamic document or presentation that details your company's present situation, outlines your future plans, and shows you how the company can get there. You can take many approaches to the process and consider differing ideas about what needs to go into it, but some general concepts stand.

“Strategic planning is a prompt or a facilitator for fostering strategic thinking, acting, and learning,” says Bryson. He explains that he often begins planning projects with three questions:

- What do you want to do?
- How are we going to do it?
- What would happen if you did what you want to do?

The answers to these questions make up the meat of the planning document.

A strategic plan is only effective when the writing and thinking is clear, since the intent is to help an organization keep to its mission through programs and capacity, while also building stakeholder engagement.

Question 1: Where Are We Now?

The answer (or answers) to the first question — where are we now? — addresses the foundation of your organization, and it can serve as an outline for the following sections of your strategic plan:

- Mission statement
- Core values and guiding principles
- Identification of competing organizations
- Industry analysis (this can include a SWOT or PEST analysis)

Question 2: Where Are We Going?

The answers to this question help you identify your goals for the future of the business and assess whether your current trajectory is the future you want. These aspects of the plan outline a strategy for achieving success and can include the following:

- Vision statement about what the company will look like in the future
- What is happening (both internally and externally) and what needs to change
- The factors necessary for success

Question 3: How Do We Get There?

The answers to this question help you outline the many routes you can take to achieve your vision and match your strengths with opportunities in the market. A Gantt chart can help you map out and keep track of these initiatives.

You should include the following sections:

- Specific and measurable goals
- Objectives
- An execution plan that identifies who manages and monitors the plan
- An evaluation plan that shows how you plan to measure the successes and setbacks that come with implementation

What to Include in a Strategic Plan

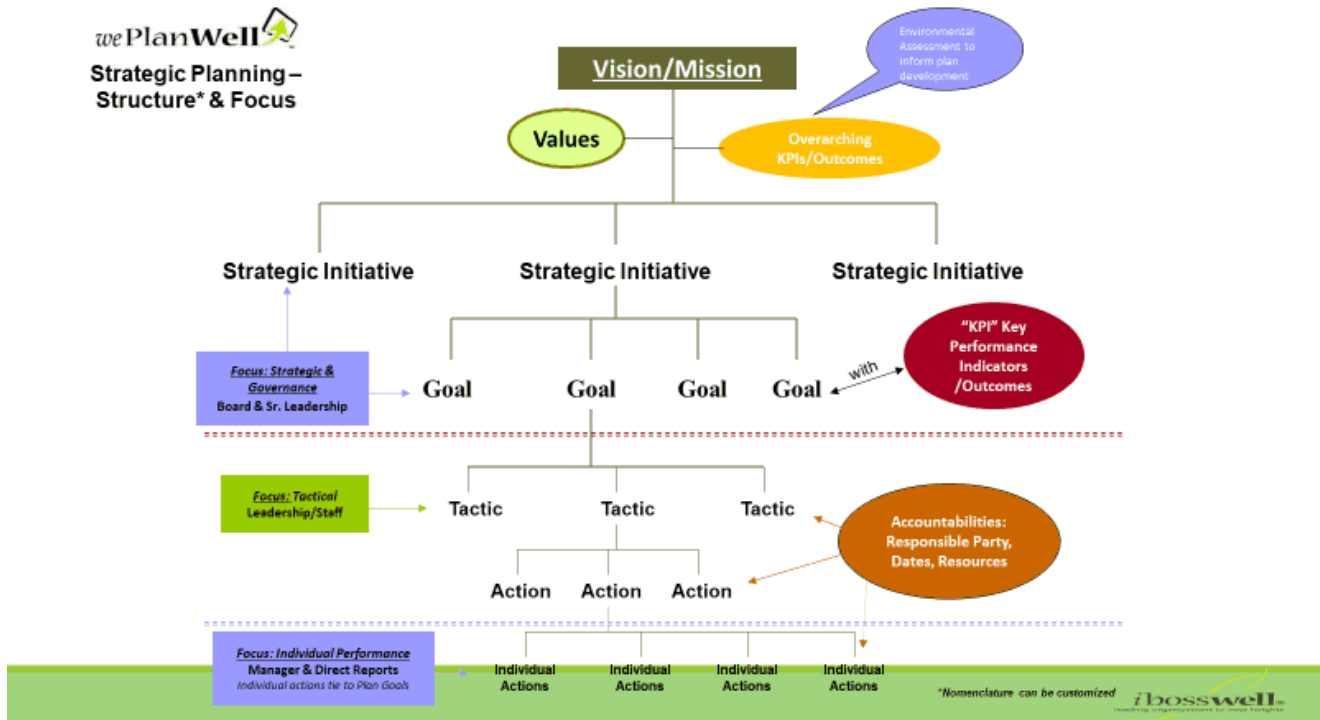
Strategic planning terminology is not standardized throughout the industry, and this can lead to confusion. Instead, strategic planning experts use many names for the different sections of a strategic plan.

“The terms are all over the map. It’s really the concept of what the intention of the terms are [that is important],” says Denise McNerney, President and CEO of iBossWell, Inc., and incoming president of the Association for Strategic Planning (ASP). She recommends coming up with a kind of glossary that defines the terms for your team. “One of the most important elements when you’re starting the strategic planning process is to get some clarity on the nomenclature. It’s just what works for your organization. Every organization is slightly different.”

No matter what terms you use, the general idea of a strategic plan is the same. “It’s like drawing a map for your company. One of the first steps is committing to a process, then determining how you’re going to do it,” McNerney explains.

She uses a basic diagram that she calls the *strategic plan architecture*. The areas above the red dotted line are the strategic parts of the plan. Below the red dotted line are the implementation pieces.





While the specific terminology varies, basic sections of a strategic plan include the following in roughly this order:

- Executive summary
- Elevator pitch or company description
- Mission statement
- Vision statement
- Goals
- Industry analysis
- Marketing plan
- Capacity
- Operations plan
- Financial projections
- Evaluation methods
- Signature page

Some plans will contain all the above sections, but others will not — what you include depends on your organization’s structure and culture.

“I want to keep it simple, so organizations can be successful in achieving [the strategic plan],” McNerney explains. “Your plan has to be aligned with your culture and your culture needs to be aligned with your plan if you’re going to be successful in implementing it.”

The following checklist will help you keep track of what you have done and what you still need to do.

Writing A Strategic Plan Section

COMPONENT	STATUS	COMMENTS
Executive Summary		
Company Description		
Mission Statement		
Vision Statement		
Core Values		
Goals		
Objectives		
Industry Analysis		
Marketing Plan		
Capacity		
Operations Plan		
Financial Projections		
Performance Indicators		
Signature Page		

[Download Strategic Plan Sections Checklist](#)

Once you've assembled your team and defined your terms, it's time to formalize your ideas by writing the strategic plan. The plan may be in the form of a document, a presentation, or another format.

You can use many models and formats to create your strategic plan (read more about them in this article). However, you will likely need to include some basic sections, regardless of the particular method you choose (even if the order and way you present them vary). In many cases, the sections of a strategic plan build on each other, so you may have to write them in order.

One tip: Try to avoid jargon and generic terms; for example, words like *maximize* and *succeed* lose their punch. Additionally, remember that there are many terms for the same object in strategic planning.

The following sections walk you through how to write common sections of a strategic plan.

How to Write an Executive Summary

The key to writing a strong executive summary is being clear and concise. Don't feel pressured to put anything and everything into this section — executive summaries should only be about one to two pages long and include the main points of the strategic plan.

The idea is to pique the reader's interest and get them to read the rest of the plan. Because it functions as a review of the entire document, write the executive summary after you complete the rest of your strategic plan.

“If you have a plan that's really lengthy, you should have a summary,” says Jim Stockmal, President of the Association for Strategic Planning (ASP). He always writes summaries last, after he has all the data and information he needs for the plan. He says it is easier to cut than to create something.

For more information about writing an effective executive summary, a checklist, and free templates, read this article.

If you want a one-page executive summary, this template can help you decide what information to include.



ONE-PAGE EXECUTIVE SUMMARY

COMPANY INFO	ELEVATOR PITCH
PROBLEM WE ARE SOLVING	SOLUTION
TARGET AUDIENCE	COMPETITIVE ANALYSIS
LAUNCH BUDGET	REVENUE FORECAST
FINANCIALS + FUNDING	PRICING OUTLOOK
GO-TO-MARKET STRATEGY	SUPPORT PLAN
LEADERSHIP + TEAM	PARTNERS

Download One-Page Executive Summary Template

Excel | Word | PDF

How to Write a Company Description

Also called an *elevator pitch*, the *company description* is a brief outline of your organization and what it does. It should be short enough that it can be read or heard during the average elevator ride.

The company description should include the history of your company, the major products and services you provide, and any highlights and accomplishments, and it should accomplish the following:

- Define what you are as a company.
- Describe what the company does.
- Identify your ideal client and customer.
- Highlight what makes your company unique.

While this may seem basic, the company description changes as your company grows and changes. For example, your ideal customer five years ago might not be the same as the current standard or the one you want in five years.

Share the company description with everyone in your organization. If employees cannot accurately articulate what you do to others, you might miss out on opportunities.

How to Write a Mission Statement

The *mission statement* explains what your business is trying to achieve. In addition to guiding your entire company, it also helps your employees make decisions that move them toward the company's overall mission and goals.

“Ideally, [the mission statement is] something that describes what you're about at the highest level,” McNerney says. “It's the reason you exist or what you do.”

Strong mission statements can help differentiate your company from your competitors and keep you on track toward your goals. It can also function as a type of tagline for your organization.

Mission statements should do the following:

- Define your company's purpose. Say what you do, who you do it for, and why it is valuable.
- Use specific and easy-to-understand language.

- Be inspirational while remaining realistic.
- Be short and succinct.

This is your chance to define the way your company will make decisions based on goals, culture, and ethics. Mission statements should not be vague or generic, and they should set your business apart from others. If your mission statement could define many companies in your line of work, it is not a good mission statement.

Mission statements don't have to be only outward-facing for customers or partners. In fact, it is also possible to include what your company does for its employees in your mission statement.

Unlike other parts of your strategic plan that are designed to be reviewed and edited periodically, your company's mission statement should live as is for a while.

That said, make the effort to edit and refine your mission statement. Take out jargon like *world class*, *best possible*, *state of the art*, *maximize*, *succeed*, and so on, and cut vague or unspecific phrasing. Then let your strategic planning committee review it.

How to Write a Vision Statement

Every action your company does contributes to its vision. The *vision statement* explains what your company wants to achieve in the long term and can help inspire and align your team.

“The vision is the highest-ordered statement of the desired future or state of what you want your business to achieve,” McNerney explains.

A clear vision statement can help all stakeholders understand the meaning and purpose of your company. It should encourage and inspire employees while setting your company's direction. It also helps you rule out elements that might not align with your vision.

Vision statements should be short (a few sentences). They should also be memorable, specific, and ambitious. But there is a fine line between being ambitious and creating a fantasy. The vision should be clearly attainable if you follow the goals and objectives you outline later in your strategic planning plan.

Because you need to know your company's goals and objectives to create an accurate vision statement, you might need to wait until you have more information about the company's direction to write your vision statement.

Below are questions to ask your team as you craft your vision statement:

- What impact do we want to have on our community and industry?

- How will we interact with others as a company?
- What is the culture of the business?

Avoid broad statements that could apply to any company or industry. For example, phrases like “delivering a wonderful experience” could apply to many industries. Write in the present tense, avoid jargon, and be clear and concise.

Vision statements should accomplish the following:

- Be inspiring.
- Focus on success.
- Look at and project about five to 10 years ahead.
- Stay in line with the goals and values of your organization.

Once you write your vision statement, communicate it to everyone in your company. Your team should be able to easily understand and repeat the company’s vision statement. Remember, the statements can change as the environment in and around your company changes.

The Difference Between Mission and Vision Statements

Mission and vision statements are both important, but they serve very different purposes.

Mission statements show why a business exists, while vision statements are meant to inspire and provide direction. Mission statements are about the present, and vision statements are about the future. The mission provides items to act upon, and the vision offers goals to aspire to.

Mission Statement	Vision Statement
Focuses what your organization does today	Focuses on what you want your company to become
Drives the company forward	Gives the company direction
Could change as business changes	Should not change often since it is linked to company’s foundation

For example, if a vision statement is “No child goes to bed hungry,” the accompanying mission would be to provide food banks within the city limits.

While many organizations have both mission and vision statements, it's not imperative. "Not everyone has a vision statement," McNerney says. "Some organizations just have one."

If you choose to have only one statement, McNerney offers some advice: "Any statement you have, if you have just one, needs to include what [you do], how [you do it], why [you do it], and who you do it for."

During the planning process, these key statements might change. "Early on in the process, you need to talk about what you are doing and why and how you are doing it. Sometimes you think you know where you want to go, but you're not really sure," McNerney says. "You need to have flexibility both on the plan content and in the process."

How to Write Your Company's Core Values

Company core values, sometimes called *organizational values*, help you understand what drives the company to do what it does. In this section, you'll learn a lot about your company and the people who work with you. It should be relatively easy to write.

"The values are the core of how you operate [and] how you treat your people, both internally and externally. Values describe the behaviors you really want to advance," McNerney says.

There are both internal and external values looking at your employees and coworkers, as well as customers and outside stakeholders. Pinpointing values will help you figure out the traits of the people you want to hire and promote, as well as the qualities you're looking for in your customers.

Your values should align with your vision statement and highlight your strengths while mitigating weaknesses. McNerney says many organizations do not really consider or are not honest about their company's values when working on strategic plans, which can lead to failure.

"Your strategies have to align with your values and vice versa," she explains.

Many companies' values sound like meaningless jargon, so take the time to figure out what matters to your company and push beyond generic language.

How to Write about Your Industry

When planning ahead for your business, it's important to look around. How are matters inside your company? What are your competitors doing? Who are your target customers?

“[If you don’t do a thorough industry analysis], you’re doing your planning with your head in the sand. If you’re not looking at the world around you, you’re missing a whole dimension about what should inform your decision making,” McNerney advises.

Writing about your industry helps you identify new opportunities for growth and shows you how you need to change in order to take advantage of those opportunities. Identify your key competitors, and define what you see as their strengths and weaknesses. Performing this analysis will help you figure out what you do best and how you compare to your competition. Once you know what you do well, you can exploit your strengths to your advantage.

In this section, also include your SWOT (strengths, weaknesses, opportunities, and threats) analysis. You can choose from many templates to help you write this section.

Next, identify your target customers. Think about what they want and need, as well as how you can provide it. Do your competitors attract your target customers, or do you have a niche that sets you apart?

The industry analysis carries a price, but also provides many benefits. “It takes some time and money to do [a thorough industry analysis], but the lack of that understanding says a lot about the future of your organization. If you don’t know what is going on around you, how can you stay competitive?” explains McNerney.

How to Write Strategic Plan Goals and Objectives

This section is the bulk of your strategic plan. Many people confuse goals and objectives, thinking the terms are interchangeable, but many argue that the two are distinct. You can think of them this way:

- **Goals:** Goals are broad statements about what you want to achieve as a company, and they’re usually qualitative. They function as a description of where you want to go, and they can address both the short and long term.
- **Objectives:** Objectives support goals, and they’re usually quantitative and measurable. They describe how you will measure the progress needed to arrive at the destination you outlined in the goal. More than one objective can support one goal.

Goals	Objectives
Broad scope	Narrow scope
General in direction, generic action	Specific direction, specific action
Abstract	Solid

Goals	Objectives
Qualitative (not necessarily measurable)	Quantitative (easily measured)
Longer term	Shorter term

For example, if your goal is to achieve success as a strategic planner, your objective would be to write all sections of the strategic plan in one month.

iBossWell, Inc.'s McNerney reiterates that there are not hard and fast definitions for the terms *goals* and *objectives*, as well as many other strategic planning concepts. "I wouldn't attempt to put a definition to the terms. You hear the terms *goals* and *objectives* a lot, but they mean different things to different people. What some people call a *goal*, others call an *objective*. What some people call an *objective*, others would call a *KPI*." The key, she explains, is to decide what the terms mean in your organization, explain the definitions to key stakeholders, and stick to those definitions.

How to Write Goals

Goals form the basis of your strategic plan. They set out your priorities and initiatives, and therefore are critical elements and define what your plan will accomplish. Some planning specialists use the term *strategic objectives* or *strategic priorities* when referring to goals, but for clarity, this article will use the term goals.

"[Goals] are the higher level that contain several statements about what your priorities are," McNerney explains. They are often near the top of your plan's hierarchy.

Each goal should reflect something you uncovered during the analysis phase of your strategic planning process. Goals should be precise and concise statements, not long narratives. For example, your goals might be the following:

- Eliminate case backlog.
- Lower production costs.
- Increase total revenue.

Each goal should have a stated outcome and a deadline. Think of goal writing as a formula: Action + detail of the action + a measurable metric + a deadline = goal. For example, your goal might be: Increase total revenue by 5 percent in three product areas by the third quarter of 2020.

Another way to look at it: Verb (action) + adjective (description) = noun (result). An example goal: Increase website fundraising.

Your goals should strike a balance between being aspirational and tangible. You want to stretch your limits, but not make them too difficult to reach. Your entire organization and stakeholders should be able to remember and understand your goals.

Think about goals with varying lengths. Some should go out five to 10 years, others will be shorter — some significantly so. Some goals might even be quarterly, monthly, or weekly. But be careful to not create too many goals. Focus on the ones that allow you to zero in on what is critical for your company's success. Remember, several objectives and action steps will likely come from each goal.

How to Write Objectives

Objectives are the turn-by-turn directions of how to achieve your goals. They are set in statement and purpose with no ambiguity about whether you achieve them or not.

Your goals are where you want to go. Next, you have to determine how to get there, via a few different objectives that support each goal. Note that objectives can cover several areas.

“You need implementation elements of the plan to be successful,” McNerney says, adding that some people refer to objectives as *tactics*, *actions*, and many other terms.

Objectives often begin with the words increase or decrease because they are quantifiable and measurable. You will know when you achieve an objective. They are action items, often with start and end dates.

Use the goal example from earlier: Increase total revenue by 5 percent in three product areas by the third quarter of 2020. In this example, your objectives could be:

- Approach three new possible clients each month.
- Promote the three key product areas on the website and in email newsletters.

Think of the acronym SMART when writing objectives: Make them specific, measurable, achievable, realistic/relevant, and time-bound.

Breaking down the process further, some strategic planners use the terms *strategies* and *tactics* to label ways to achieve objectives. Using these terms, strategies describe an approach or method you will use to achieve an objective. A tactic is a specific activity or project that achieves the strategy, which, in turn, helps achieve the objective.

How to Write about Capacity, Operations Plans, Marketing Plans, and Financial Plans

After you come up with your goals and objectives, you need to figure out who will do what, how you will market what they do, and how you will pay for what you need to do.

“If you choose to shortchange the process [and not talk about capacity and finances], you need to know what the consequences will be,” explains McNerney. “If you do not consider the additional costs or revenues your plan is going to drive, you may be creating a plan you cannot implement.”

To achieve all the goals outlined in your strategic plan, you need the right people in place. Include a section in your strategic plan where you talk about the capacity of your organization. Do you have the team members to accomplish the objectives you have outlined in order to reach your goals? If not, you may need to hire personnel.

The operations plan maps out your initiatives and shows you who is going to do what, when, and how. This helps transform your goals and objectives into a reality. A summary of it should go into your strategic plan. If you need assistance writing a comprehensive implementation plan for your organization, this article can guide you through the process.

A *marketing plan* describes how you attract prospects and convert them into customers. You don't need to include the entire marketing plan in your strategic plan, but you might want to include a summary. For more information about writing marketing plans, this article can help.

Then there are finances. We would all like to accomplish every goal, but sometimes we do not have enough money to do so. A financial plan can help you set your priorities. Check out these templates to help you get started with a financial plan.

How to Write Performance Indicators

In order to know if you are reaching the goals you outline in your strategic plan, you need performance indicators. These indicators will show you what success looks like and ensure accountability. Sadly, strategic plans have a tendency to fail when nobody periodically assesses progress.

Key performance indicators (KPIs) can show you how your business is progressing. KPIs can be both financial and nonfinancial measures that help you chart your progress and take corrective measures if actions are not unfolding as they should. Other terms similar to KPIs include *performance measures* and *performance indicators*.

Performance indicators are not always financial, but they must be quantifiable. For example, tracking visitors to a website, customers completing a contact form, or the number of proposals that close with deals are all performance indicators that keep you on track toward achieving your goals.

When writing your performance indicators, pay attention to the following:

- Define how often you need to report results.
- Every KPI must have some sort of measure.
- List a measure and a time period.
- Note the data source where you will get your information to measure and track.

ASP's Stockmal has some questions for you to ask yourself about picking performance indicators.

- Are you in control of the performance measure?
- Does the performance measure support the strategic outcomes?
- Is it feasible?
- Is data available?
 - Who is collecting that data, and how will they do it?
 - Is the data timely?
 - Is it cost-effective to collect that data?
- Is the goal quantifiable, and can you measure it over time?
- Are your targets realistic and time-bound?

Stockmal also says performance indicators cannot focus on only one thing at the detriment of another. "Don't lose what makes you good," he says. He adds that focusing on one KPI can hurt other areas of a company's performance, so reaching a goal can be short-sided.

Some performance indicators can go into your strategic plan, but you might want to set other goals for your organization. A KPI dashboard can help you set up and track your performance and for more information about setting up a KPI dashboard, this article can help.

Communicating Your Strategic Plan

While writing your strategic plan, you should think about how to share it. A plan is no good if it sits on a shelf and nobody reads it.

“After the meetings are over, you have to turn your strategy into action,” says Stefan Hofmeyer, an experienced strategist and co-founder of Global PMI Partners. “Get in front of employees and present the plan [to get everyone involved].” Hofmeyer explains his research has shown that people stay with companies not always because of money, but often because they buy into the organization’s vision and want to play a part in helping it get where it wants to go. “These are the people you want to keep because they are invested,” he says.



Decide who should get a physical copy of the entire plan. This could include management, the board of directors, owners, and more. Do your best to keep it from your competitors. If you distribute it outside of your company, you might want to attach a confidentiality waiver.

You can communicate your plan to stakeholders in the following ways:

- Hold a meeting to present the plan in person.
- Highlight the plan in a company newsletter.
- Include the plan in new employee onboarding.
- Post the plan on the employee intranet, along with key highlights and a way to track progress.

If you hold a meeting, make sure you and other key planners are prepared to handle the feedback and discussion that will arise. You should be able to defend your plan and reinforce its key areas. The goal of the plan’s distribution is to make sure everyone understands their role in making the plan successful.

Remind people of your company’s mission, vision, and values to reinforce their importance. You can use posters or other visual methods to post around the office. The more that people feel they play an important part in the organization’s success, the more successful you will be in reaching your goals of your strategic plan.

Challenges in Writing a Strategic Plan

As mentioned, strategic planning is a process and involves a team. As with any team activity, there will be challenges.

Sometimes the consensus can take priority over what is clear. Peer pressure can be a strong force, especially if a boss or other manager is the one making suggestions and people feel pressured to conform. Some people might feel reluctant to give any input because they do not think it matters to the person who ultimately decides what goes into the plan.

Team troubles can also occur when one or more members does not think the plan is important or does not buy into the process. Team leaders need to take care of these troubles before they get out of hand.

Pay attention to your company culture and the readiness you have as a group, and adapt the planning process to fit accordingly. You need to find the balance between the process and the final product.

The planning process takes time. Many organizations do not give themselves enough time to plan properly, and once you finish planning, writing the document or presentation also takes time, as does implementation. Don't plan so much that you ignore how you are going to put the plan into action. One symptom of this is not aligning the plan to fit the capacity or finances of the company.

Stockmal explains that many organizations often focus too much on the future and reaching their goals that they forget what made them a strong company in the first place. Business architecture is important, which Stockmal says is "building the capabilities the organization needs to fulfill its strategy." He adds that nothing happens if there is no budget workers to do the work necessary to drive change.

Be careful with the information you gather. Do not take shortcuts in the research phase — that will lead to bad information coming out further in the process. Also, do not ignore negative information you may learn. Overcoming adversity is one way for companies to grow.

Be wary of cutting and pasting either from plans from past years or from other similar organizations. Every company is unique.

And while this may sound obvious, do not ignore what your planning process tells you. Your research might show you should not go in a direction you might want to.

Writing Different Types of Strategic Plans

The strategic planning process will differ based on your organization, but the basic concepts will stay the same. Whether you are a nonprofit, a school, or a for-profit entity, strategic plans will look at where you are and how you will get to where you want to go.

How to Write a Strategic Plan for a Nonprofit

For a nonprofit, the strategic plan's purpose is mainly how to best advance the mission. It's imperative to make sure the mission statement accurately fits the organization.

In addition to a SWOT analysis and other sections that go into any strategic plan, a nonprofit needs to keep an eye on changing factors, such as funding. Some funding sources have finite beginnings and endings. Strategic planning is often continuous for nonprofits.

A nonprofit has to make the community care about its cause. In a for-profit organization, the marketing department works to promote the company's product or services to bring in new revenue. For a nonprofit, however, conveying that message needs to be part of the strategic plan.

Coming up with an evaluation method and KPIs can sometimes be difficult for a nonprofit, since they are often focused on goals other than financial gain. For example, a substance abuse prevention coalition is trying to keep teens from starting to drink or use drugs, and proving the coalition's methods work is often difficult to quantify.

This template can help you visually outline your strategic plan for your nonprofit.

NONPROFIT STRATEGIC PLAN

BACKGROUND			
LEGAL NAME AND ADDRESS		NEED SERVED STATUS	
TIME PERIOD IN EXISTENCE		GEOGRAPHIC REGION SERVED	
LEGAL STATUS OF ORGANIZATION		TARGET AUDIENCE	
STAFFING PROFILE AND STRUCTURE		SUCCESSES OF PAST YEAR	
NEEDS SERVED / IMPORTANCE		ANTICIPATED CHALLENGES	
VISION		MISSION	
Envision the ideal result of the work of the organization		A focused description of the organization's purpose	
VALUES	Choose ten of the values listed to the right or your own additions and write a sentence for each describing how this value guides your business and helps the organization achieve its Vision and Mission. <div style="font-size: small; text-align: right; margin-top: 5px;"> Integrity Teamwork Partnership Honesty Communication Respect Safety Attitude Customer Service Trustworthy Diversity Individuality Creativity Growth Achievement Competence Accountability Community Community Quality Commitment to Success Ethical Legal Professionalism Finance Responsibility Consistency Empowerment Fun Risk-taking Efficiency Balance Loyalty Optimism Reliable Inspiring </div>		
	Membership / Audience Demographic		GROUPS MOST SERVED
WHO WE SERVE		MARKETING & COMMUNICATION PLAN	
SMART OBJECTIVES (JUST 3-5)	S-Specific, M-Measurable, A-Achievable, R-Realistic, T-Timebound		
1		WHAT THE AUDIENCE NEEDS TO HEAR	
2		BEST WAY TO REACH & COMMUNICATE	
3		COMMUNICATION SCHEDULE & FREQUENCY	
4		HOW TO MEASURE MESSAGE REACH	
5		ADDITIONAL COMMENTS	

Download Nonprofit Strategic Plan Template

Excel | Smartsheet

How to Write a Strategic Plan for a School

Writing a strategic plan for a school can be difficult because of the variety of stakeholders involved, including students, teachers, other staff, and parents.

Strategic planning in a school is different from others because there are no markets to explore, products to produce, clients to woo, or adjustable timelines. Schools often have set boundaries, missions, and budgets.

Even with the differences, the same planning process and structure should be in place for schools as it is for other types of organizations.

This template can help your university or school outline your strategic plan.

UNIVERSITY STRATEGIC PLAN OUTLINE

ABOUT US	
PAST - where we have been	
TODAY - where we are now	
VISION - where we should go and why	
MISSION - who we are, how we work toward our vision, what makes us unique	
CORE VALUES - guiding principles of our work and how we operate	
GOALS	
OBSTACLES - what could prevent us from realizing our vision	
LONG-TERM GOALS - what we will do to realize our vision	

Download University Strategic Plan Outline – Word

How to Write a 5-Year Strategic Plan

There is no set time period for a strategic plan, but five years can be a sweet spot. In some cases, yearly planning might keep you continually stuck in the planning process, while 10 years might be too far out.

In addition to the basic sections that go into any strategic plan, when forecasting five years into the future, put one- and three-year checkpoints into the plan so you can track progress intermittently.

How to Write a 3-Year Strategic Plan

While five years is often the strategic planning sweet spot, some organizations choose to create three-year plans. Looking too far ahead can be daunting, especially for a new or changing company.

In a three-year plan, the goals and objectives have a shorter timeframe and you need to monitor them more frequently. Build those checkpoints into the plan.

“Most organizations do a three- to five-year plan now because they recognize the technology and the changes in business that are pretty dynamic now,” Stockmal says.

How to Write a Departmental Strategic Plan

The first step in writing a strategic plan for your department is to pay attention to your company’s overall strategic plan. You want to make sure the plans align.

The steps in creating a plan for a department are the same as for an overall strategic plan, but the mission statement, vision, SWOT analysis, goals, objectives, and so on are specific to only the people in your department. Look at each person separately and consider their core competencies, strengths, capabilities, and weaknesses. Assign people who will be responsible for certain tasks and tactics necessary to achieve your goals.

If you have access to a plan from a previous year, see how your department did in meeting its goals. Adjust the new plan accordingly.

When you finish your departmental plan, make sure to submit it to whomever is responsible for your company’s overall plan. Expect to make changes.

How to Write a Strategic Plan for a Project

A strategic plan is for the big picture, not for a particular project for an organization. Instead of a strategic plan, this area would fall under project management.

If you have a failing project and need to turn it around, this article might help.

How to Write a Personal Strategic Plan

Creating a strategic plan isn't only for businesses. You can also create a strategic plan to help guide both your professional and personal life. The key is to include what is important to you. This process takes time and reflection.

Be prepared for what you discover about yourself. Because you will be looking at your strengths and weaknesses, you might see things you do not like. It is important to be honest with yourself. A SWOT analysis on yourself will give you some honest feedback if you let it.

Begin with looking at your life as it is now. Are you satisfied? What do you want to do more or less? What do you value most in your life? Go deeper than saying family, happiness, and health. This exercise will help you clarify your values.

Once you know what is important to you, come up with a personal mission statement that reflects the values you cherish. As it does within a business, this statement will help guide you in making future decisions. If something does not fit within your personal mission, you shouldn't do it.

Using the information you discovered during your SWOT and mission statement process, come up with goals that align with your values. The goals can be broad, but don't forget to include action items and timeframes to help you reach your goals.

As for the evaluation portion, identify how you will keep yourself accountable and on track. You might involve a person to remind you about your plan, calendar reminders, small rewards when you achieve a goal, or another method that works for you.

Below is additional advice for personal strategic plans:

- There are things you can control and things you cannot. Keep your focus on what you can act on.
- Look at the positive instead of what you will give up. For example, instead of focusing on losing weight, concentrate on being healthier.
- Do not overcommit, and do not ignore the little details that help you reach your goals.

No matter what, do not dwell on setbacks and remember to celebrate successes.

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