



STRATEGIC PLANNING TEMPLATE

SECTION 1 — FOUNDATION

1. Mission Statement

Instructions: Describe why your organization exists and what you do.

Prompts:

- Who do we serve?
- What do we deliver?
- Why does it matter?

Write your Mission:

2. Vision Statement

Instructions: Describe your desired future state 3–5 years from now.

Prompts:

- What impact will we have achieved?
- What will be different or better?

Write your Vision:

3. Core Values

Instructions: Identify the principles that guide behaviors and decisions.

Values & Behaviors:

1.

2.

3.

4.

4. Strategic Mandate

Instructions: Clarify what this strategic plan must address.

Strategic Questions:

1. _____

2. _____

3. _____

Scope / Assumptions / Constraints:

SECTION 2 — INSIGHTS & ANALYSIS

5. Stakeholder Insights

Strengths:

Needs:

6. Internal Assessment (SWOT)

Strengths:

Weaknesses:

Opportunities:

Threats:

7. External Landscape

Market Trends:

Competitors:

8. Future State Definition

Future State Narrative:

SECTION 3 — STRATEGIC DIRECTION

9. Strategic Pillars

- 1. _____
- 2. _____
- 3. _____

10. Goals Under Each Pillar

Pillar 1 Goals:

11. Strategies & Initiatives

Goal:

Strategy 1:

Initiatives:

SECTION 4 — METRICS & IMPLEMENTATION

12. KPIs & Measures

☐ Goal ☐ KPI ☐ Baseline ☐ Target ☐ Frequency ☐ Owner

13. Implementation Roadmap

Short-Term:

Mid-Term:

Long-Term:

14. Risk & Mitigation Plan

Risk:

Mitigation:

SECTION 5 — GOVERNANCE & MONITORING

15. Governance Model

Leadership Responsibilities:

16. Review & Reporting Rhythm

Quarterly Reviews:

17. Communication & Change Management

Communication Plan:
