



## 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:

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#### 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:

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#### 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:

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Needs:

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### 6. Internal Assessment (SWOT)

Strengths:

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Weaknesses:

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Opportunities:

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Threats:

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### 7. External Landscape

Market Trends:

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Competitors:

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### 8. Future State Definition

Future State Narrative:

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### SECTION 3 — STRATEGIC DIRECTION

#### 9. Strategic Pillars

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

#### 10. Goals Under Each Pillar

Pillar 1 Goals:

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#### 11. Strategies & Initiatives

Goal:

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Strategy 1:

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Initiatives:

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## SECTION 4 — METRICS & IMPLEMENTATION

### 12. KPIs & Measures

Goal     KPI     Baseline     Target     Frequency     Owner

### 13. Implementation Roadmap

Short-Term:

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Mid-Term:

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Long-Term:

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### 14. Risk & Mitigation Plan

Risk:

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Mitigation:

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## SECTION 5 — GOVERNANCE & MONITORING

### **15. Governance Model**

Leadership Responsibilities:

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### **16. Review & Reporting Rhythm**

Quarterly Reviews:

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### **17. Communication & Change Management**

Communication Plan:

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