

Quick & Dirty Strategic Planning for Busy Speakers

Continually scan your environment	Throughout the year, keep your eyes & ears open to trends, opportunities etc. Place those great ideas in a strategic planning “wish list” folder.
Review the basics	<ul style="list-style-type: none"><input type="checkbox"/> Vision/Mission/Definition of Success<input type="checkbox"/> Unique Selling Proposition<input type="checkbox"/> Customers<input type="checkbox"/> Products/Services<input type="checkbox"/> Operations/Process<input type="checkbox"/> Financials<input type="checkbox"/> Learning & Growth<input type="checkbox"/> Last Year’s goals<input type="checkbox"/> SWOT<input type="checkbox"/> Wish list folder
<ul style="list-style-type: none">◆ Historical◆ +/-◆ Know the #s	
Themes/Patterns	Share with your kitchen cabinet/employees. Ask for input.
Set aside time	Clear a half/full day on your/your team’s calendar to focus.
Brainstorm/Sort	Write each “great” idea on an index card. Sort cards into “piles”.
Create goal statements	<ul style="list-style-type: none">◆ Concrete SMART goal statement for each pile.◆ Why do it?◆ What needs to be done?◆ Who should do it?◆ Funding requirements?
Roadblocks	Identify strategies to remove roadblocks.
Prioritize	Prioritize the goals with respect to your vision/def. of success.
3 month plans	Plan the first 3 months. Make forward progress each week.
Accountability	Mastermind/Buddy/Checklist/Reports/Rewards

Strategic Planning Goal Sheet

Goal

Why?

Roadblocks

Strategies

Key Activities

Next Three Months

Responsibility

Accountability