Strategy: One-Page Strategic Plan

Organization Name:

People (Relationship Drivers)

Employees	Customers	Shareholders
1 _____	1 _____	1 _____
2 _____	2 _____	2 _____
3 _____	3 _____	3 _____

CORE VALUES/BELIEFS (Should/Shouldn't)	PURPOSE (Why)	TARGETS (3-5 YRS.) (Where)	GOALS (1 YR.) (What)

TARGETS (3-5 YRS.)

Future Date	
Revenues	
Profit	
Mkt Cap	

Sandbox

_____
_____
_____

GOALS (1 YR.)

Yr Ending	
Revenues	
Profit	
Mkt Cap	
Gross Margin	
Cash	
A/R Days	
Inv. Days	
Rev./Emp.	

Actions *To Live Values, Purpose, BHAG*	***Key Thrusts/Capabilities*** *3 – 5 Year Priorities*	***Key Initiatives*** *Annual Priorities*
1	1	1
2	2	2
3	3	3
4	4	4
5	5	5

Core Competencies	Profit/X	Brand Promise KPIs	Critical #: People (B/S)
			⬛ _____
			🟢 _____
			🟡 Between green and red
	BHAG®	**Brand Promises**	🔴 _____
			Critical #: Process (P/L)
			⬛ _____
			🟢 _____
			🟡 Between green and red
			🔴 _____

Strengths:
1 _____
2 _____
3 _____

Weakness:
1 _____
2 _____
3 _____

Process (Productivity Drivers)

Make/Buy	*Sell*	*Record Keeping*
1 _____	1 _____	1 _____
2 _____	2 _____	2 _____
3 _____	3 _____	3 _____

ACTIONS (QTR) (How)	THEME (QTR/ANNUAL)	YOUR ACCOUNTABILITY (Who/When)

ACTIONS (QTR) (How)

Qtr. #	
Revenues	
Profit	
Mkt Cap	
Gross Margin	
Cash	
A/R Days	
Inv. Days	
Rev./Emp.	

Rocks

Quarterly Priorities		*Who*
1		
2		
3		
4		
5		

THEME (QTR/ANNUAL)

Deadline	
Measurable Target/Critical #	

Theme Name

_____

_____

Scoreboard Design

Describe and/or sketch your design in this space.

YOUR ACCOUNTABILITY (Who/When)

Your KPIs	*Goal*
1	
2	
3	

Your Quarterly Priorities		*Due*
1		
2		
3		
4		
5		

Critical #: People (B/S)

🟢 _____
🟢 _____
🟡 Between green and red
🔴 _____

Critical #: Process (P/L)

🟢 _____
🟢 _____
🟡 Between green and red
🔴 _____

Celebration

_____
_____
_____
_____

Reward

_____
_____
_____
_____

Critical #: People (B/S)

🟢 _____
🟢 _____
🟡 Between green and red
🔴 _____

Critical #: Process (P/L)

🟢 _____
🟢 _____
🟡 Between green and red
🔴 _____

Opportunities:
1 _____
2 _____
3 _____

Threats:
1 _____
2 _____
3 _____