

Simple Strategic Plan for

Prepared by _____ on _____
for the period of _____

**First say to yourself what you would be;
and then do what you have to do.**
– Epictetus

**Reduce your plan to writing.
The moment you complete this,
you will have definitely given
concrete form to the intangible desire.**
– Napoleon Hill

**That which we persist in doing becomes
easier to do, not that the nature of the
thing itself is changed, but that
our power to do is increased.**
– Ralph Waldo Emerson

**A good plan, violently executed now,
is better than a perfect plan next week.**
– George S. Patton

**All you need is the plan, the road map,
and the courage to press on to your destination.**
– Earl Nightingale

**Commit to the LORD whatever you do,
and He will establish your plans.**
– Proverbs 16:3 (NIV)

**SSP Step 1:
SWOT**



| Strengths: | |
|------------|--|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

| Weaknesses: | |
|-------------|--|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

| Opportunities: | |
|----------------|--|
| 1 | |
| 2 | |
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| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

| Threats: | |
|----------|--|
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| 4 | |
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| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

SSP Step 2:
Mission Statement



What do YOU want to get PAID to do?

SSP Step 3: Core Values



What does my business stand for?

| | |
|----|--|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

SSP Step 4: Vision Narrative



What do I want my business (and life) to become?

Long-Term (~3-5 years):

Mid-Term (~1 year):

Short-Term (~90 days):

SSP Step 5: Business Objectives



What is the purpose for my business? Why does it exist?

| | |
|----|--|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

SSP Step 6: SWOT Analysis



| Strengths: | |
|------------|--|
| 1 | |
| 2 | |
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| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

| Weaknesses: | |
|-------------|--|
| 1 | |
| 2 | |
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| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

| Opportunities: | |
|----------------|--|
| 1 | |
| 2 | |
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| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

| Threats: | |
|----------|--|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |

SSP Step 7: Key Strategies (Projects)



What are the '10,000-ft-level' things I must do to achieve my objectives?

| Must Do Projects | |
|------------------|--|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |

| Should Do Projects | |
|--------------------|--|
| 1 | |
| 2 | |
| 3 | |
| 4 | |
| 5 | |
| 6 | |
| 7 | |
| 8 | |
| 9 | |
| 10 | |
| 11 | |
| 12 | |

SSP Step 8: Major Immediate Goals



| | |
|------------------|--|
| Project 1 | |
| Goal A | |
| Goal B | |
| Goal C | |
| Project 2 | |
| Goal A | |
| Goal B | |
| Goal C | |
| Project 3 | |
| Goal A | |
| Goal B | |
| Goal C | |
| Project 4 | |
| Goal A | |
| Goal B | |
| Goal C | |
| Project 5 | |
| Goal A | |
| Goal B | |
| Goal C | |
| Project 6 | |
| Goal A | |
| Goal B | |
| Goal C | |

SSP Step 9: Action Steps (Tasks)



| | | | | |
|------------------|---------------------------|----------------------|--------------|---------------|
| Project 1 | | | | |
| Goal A | | | | |
| | Action Steps/Tasks | Name/Resource | Start | Finish |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal B | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal C | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

Simple Strategic Plan for: _____

| | | | | |
|------------------|---------------------------|----------------------|--------------|---------------|
| Project 2 | | | | |
| Goal A | | | | |
| | Action Steps/Tasks | Name/Resource | Start | Finish |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal B | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal C | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

Simple Strategic Plan for: _____

| | | | | |
|------------------|---------------------------|----------------------|--------------|---------------|
| Project 3 | | | | |
| Goal A | | | | |
| | Action Steps/Tasks | Name/Resource | Start | Finish |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal B | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal C | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

Simple Strategic Plan for: _____

| | | | | |
|------------------|---------------------------|----------------------|--------------|---------------|
| Project 4 | | | | |
| Goal A | | | | |
| | Action Steps/Tasks | Name/Resource | Start | Finish |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal B | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal C | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

Simple Strategic Plan for: _____

| | | | | |
|------------------|---------------------------|----------------------|--------------|---------------|
| Project 5 | | | | |
| Goal A | | | | |
| | Action Steps/Tasks | Name/Resource | Start | Finish |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal B | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal C | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |

Simple Strategic Plan for: _____

| | | | | |
|------------------|---------------------------|----------------------|--------------|---------------|
| Project 6 | | | | |
| Goal A | | | | |
| | Action Steps/Tasks | Name/Resource | Start | Finish |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal B | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| Goal C | | | | |
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
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| 5 | | | | |

Simple Strategic Plan Instructions

SSP Step 1) SWOT

Building a SWOT chart is the first step in building your plan of action. Be honest in assessing each area. The rest of your strategic plan is built upon this exercise. Use simple bullet points.

- **Strengths** – Document what you do inherently well (where are you remarkable?) and other factors that are working in your favor at this point in time. These are the good things that you can leverage to your advantage.
- **Weaknesses** – Enter the things you don't/can't do well right now. These are areas you need to develop into minimum competence or eliminate altogether as you move forward. They are present pains and hurting your efforts.
- **Opportunities** – Write down the things that can take you to the next level once you get going. What can you tap into to get to the next level? You will need to prioritize your activities to take advantage of these areas.
- **Threats** – List the things that are in your way or can take you down (this may include your perceived or real competitors). Counter/eliminate them while moving forward.

SSP Step 2) Mission Statement

The Mission Statement for your business taps into your passion and begins to define the dream. It should be succinct, clear, and unchanging. This is where you draw a line in the sand and give purpose to your business. What does it exist for? What will it always do, even if the products change over time?

- **What does it exist for?** – Use your passion. Think about the reason you wanted to start the business when it was just an idea.
- **What will it always do, even if the products and services change over time?** – Think broader than the products and services you provide. Technology will change over time, and so will the needs and wants of your target market.
- **Start Writing** –Don't stare at a blank screen or sheet of paper too long. Start by writing down your thoughts, dreams, and desires for the business. Do mind-maps or other exercises to get going. Record yourself talking to a friend about it, and then take notes when you listen to it. Themes and keywords will start to appear.
- **Refine** – Once you get it down to a few words, review it frequently and refine it over time. Hopefully the concept will remain the same, but better words will punch it up.

SSP Step 3) Core Values

Define the Core Values of your business (the things you care about). These values will be specific extensions of the Mission Statement and define why you do it.

In the beginning it may be all about you. As you grow (if that's your desire), you may have other people working for your business. These are the values you want to instill in them, but also values you want to have defined so that when it comes time to look for employees, you already know what you want! It doesn't matter how talented someone is at a task... if they don't believe in your company in the right way, they aren't the right fit.

You may want to categorize the Core Values as Internal (what you value for yourself or within your business) or External (your values toward and on behalf of your customers).

These values will also allow you to explore the right opportunities to collaborate with other businesses and vendors. In order to stay true to your values, those you interact with will need to be in alignment with them as well.

Simple Strategic Plan Instructions

SSP Step 4) Vision Narrative

A vision defines what's possible. It should be in line with your Mission Statement and will provide guidance for the actions you will need to take over the next 3-5 years. It will change over time (as your vision grows or is achieved), but should be firm enough that it doesn't change daily.

One way to start is to imagine walking through an ideal day 3-5 years in the future. Capture your environment and emotions.

- What do you do when you wake up?
- How do you interact with your family?
- What are your recent achievements?
- What tasks are you working on?
- What bigger dreams are you working on for the future?
- How do you wrap up your day?

In addition to documenting a long-term Vision Narrative of 3-5 years, craft a vision for about one year from now and a vision for where you want to be three months from today.

These shorter-term visions will begin to point out the work required to attain the long-term vision. Use these as your plan becomes more tangible in the coming steps of the process.

Your vision should be big enough to challenge you. Stand in awe of your vision, because once written, it's real and achievable.

SSP Step 5) Business Objectives

List the specific things your business needs to accomplish. No more dreaming... these are future accomplishments!

Remember to document your motivations for starting your business (financial freedom, owning your time, bringing a product/service into the world, etc.).

Capture both professional and personal objectives. They will support each other in most cases.

Be specific and outline the overarching goals for your business... even if it may take decades to realize some of them. Imagine the impact of your business on your life, as well as any impacts that may outlive you.

SSP Step 6) SWOT Analysis

Look back over your initial SWOT Analysis and develop specific actions to leverage your Strengths, mitigate/neutralize your Weaknesses, take advantage of your Opportunities, and eliminate your Threats.

Copy the contents of your SWOT and respond to each entry in detail.

Strengths need to be used or they offer no advantage. Put them into action. This is where you need to spend most of your effort.

Weaknesses can hurt you. Document ways to put them in a box or minimize their impact.

Opportunities need to be fed. Review each one and offer specific actions you can take to make the Opportunity a reality.

Threats will always exist and should not be ignored. Focus the bulk of your responses on those that offer the most immediate and severe impact. Often using your Strengths fully will minimize Threats.

Simple Strategic Plan Instructions

SSP Step 7) Key Strategies

This is the part of the planning process where you narrow your focus and begin to prioritize your efforts. There will be more things to do than are possible. Put your energy into the most important things and your business will have a fighting chance to survive and thrive.

Document your most important projects. Remember that a project has a specific purpose, an intended outcome and a defined timeline. Structure your projects accordingly.

Once documented, the projects must be prioritized from the most important to least important. This is a subjective process, but objective criteria may be used to help (impact, precedence with other projects, profit, timing, available resources, etc.).

Must Do Projects will get your immediate attention over the next 90 days, even if they may take longer to complete. These are the projects that typically have the biggest and most tangible Return on Investment (ROI)... which can be more than just money.

Should Do Projects are the holding pen for everything else you need to get done. Promote them as time or opportunities arise, but always act with intention. Some many never be realized, while others will be first in line for the next quarterly planning cycle.

SSP Step 8) Major Immediate Goals

Copy each of your Must Do Projects into the template and document the Major Immediate Goals for each one.

Immediate is the key word. Planning too far out can be paralyzing. Instead, focus on the next 90 days and define the specific things you need to achieve to move your business forward.

Some of the Projects will be completed within the 90 days, while others will take longer. Document only the Goals that can be completed within 90 days.

Create a sense of urgency and build some momentum! Be aggressive, but realistic in terms of your resources (time, money, etc.).

Your Goals should be specific and measurable. Write them in terms of the accomplishment to be achieved, not the action of doing them (noun-based instead of verb-based).

Each Project will need at least one Goal, and most will require several to be accomplished.

SSP Step 9) Action Steps

Copy each of your Must Do Projects and Major Immediate Goals into the template, and then define the actions needed to accomplish each Goal.

Every Goal will have at least one Action Step (likely more). Set start and end dates, assign resources, and get to work!

When you first start this process, it's hard to know how long things will take and how much effort is involved. It's a BIG guess, but you will learn and make adjustments along the way.

**For more information about the SSP
and additional planning & execution concepts, read
Conquer the Entrepreneur's Kryptonite by James Woosley.**