ONE-PAGE STRATEGIC PLAN for:

ORGANIZATION

STRATEGY THEME:

Opportunities to exceed Plan:

1.
2.
3.
4.
5.

Threats to achieving Plan:

1.
2.
3.
4.
5.

Core Values & Culture
(Foundation – Who We Are)

OUR PHILOSOPHY:

QUALITY STATEMENT
What we deliver

Purpose & Passion
(Why We Exist)

KEY OBJECTIVES AND GOALS
Supporting Values, Purpose, & BHAG

1.
2.
3.
4.
5.

OUR MISSION:

OUR PASSION:

OUR VISION:

Mission Milestones
(Where We Are Headed)

KEY FINANCIAL METRICS
Our 3–5 Year Priorities

1.
2.
3.
4.
5.

3-5 YEAR TARGETS:

Future Date:
Revenues:
Funding Mix:
Surplus/Deficit:
Occupancy Rate:
Total No. of Clients:
Our Sandbox (Region):

SMART NUMBERS
Key Long-Term Metrics and Targets

Annual Goals
(What We Do To Get There)

KEY INITIATIVES
Our Annual Priorities

1.
2.
3.
4.
5.

ANNUAL TARGETS:

Future Date:
Revenues:
Funding Mix:
Surplus/Deficit:
Occupancy Rate:
No. of Clients:
Cash Reserves:
A/R Days:

Big Actions
(How Do We Do It)

KEY "ROCKS"
Our Priorities

1.
2.
3.
4.
5.

NON-FINANCIAL SMART NUMBERS

STRATEGY DREAM STATEMENT and BHAG *(Big, Hairy, Audacious Goal)*:

Schedule
(When Does It Get Done)

KEY "ROCKS" DEADLINES & MEASURABLE METRICS
When things get done, and how we know they are done right

1.
2.
3.
4.
5.

Reward or Celebration:

Work / Responsibility
(Who Is Accountable)

KEY "ROCKS" ASSIGNMENTS OF RESPONSIBILITY
Who is going to be accountable for moving each of our Rocks?

1.
2.
3.
4.
5.

Reward or Celebration:

STRATEGIC PLANNING
STEPS TO SUCCESS

Time Frame		
DAILY	Work	WHO Takes Responsibility and Sees It Gets Done?
WEEKLY	Schedule	WHEN Does It Get Done?
QUARTERLY	Big Actions	HOW Do We Do It?
ANNUALLY	Annual Goals	WHAT Do We Do to Get There?
3-5 YEARS	Mission Milestones	WHERE Are We Headed?
LEADER LIFE	Purpose and Passion	WHY Do We Exist?
FOREVER	Core Values and Culture	FOUNDATION