

Purpose of Company: _____

Describe the company today

Strategic Initiatives

3-5 year Vision

- 1.
- 2.
- 3.
- 4.
- 5.

Definitions:

"Purpose": is the inspirational reason why the company exists. It is never satisfied and serves to connect employees to a meaningful purpose.

"Vision" is a description of the company in the future. It includes a vivid picture of major categories such as customers, products and services, competitors, culture, employees, finances, etc.

"Describe today" is the current picture of the same categories used in the vision

"Strategic initiatives" are goals that will take more than one year to accomplish.

Instructions:

Start with a column where you have clarity, then complete the remaining columns. For example:

- If you have a clear vision, start there and then write a description of where you are today. Lastly, complete the 5 most critical steps that will move you toward that vision.
- If you have a clear idea of what you want to do, start there and imagine what your company would look like if you were wildly successful in implementing your strategic initiatives.
- If you don't have a vision or an idea of what you want to do, then experiment and brainstorm. For example, what would the company look like "if we did _____?" It is vital to start somewhere with something so that you and your company can focus.

After the form is completed, review it and change the strategic initiatives that:

- no one, especially you, wants to do. These are easily identified as they usually start with, "We should..." These goals have a near-zero rate of completion.
- are difficult to measure. Without clear metrics, an unclear goal yields no accountability.
- don't support or enhance your competitive advantage. Why put so much effort into anything that doesn't make you or your company special?

Keep reviewing and revising your Big Picture until you feel excited, motivated and focused.

After you have identified your top 5 strategic initiatives, then begin your tactical planning for the year. What progress do you want to make this year on each initiative? Your tactical planning describes how you will achieve it. Each major goal for the year should have an action plan that identifies, at a minimum, who is responsible and the deadlines for each major task.