

VISION & STRATEGY DOCUMENT TEMPLATE

Translate momentum into meaning - and meaning into direction.

Why this matters:

Your first 100 days set the tone for how you lead.

This Vision & Strategy document isn't a "final plan" - it's your narrative for alignment and inspiration.

Use it to bring clarity, connection, and direction to your team as you transition from onboarding to execution.

Vision Statement. What's our North Star?

e.g. "To become the most trusted partner for [customer type] by making complex decisions feel simple."

Purpose / Why. Why does this matter now?

e.g. "We exist to simplify complexity for our clients, and to help our people grow by solving meaningful problems."

Core Beliefs or Guiding Principles 3–5 short bullets capturing leadership DNA.

e.g. "We lead with empathy." "We decide fast, learn faster." "We focus on outcomes, not output."

Strategic Priorities

What we'll focus on.

Section

Description

Strategic Pillars / Priorities (3–5) Each with short paragraph (2–3 sentences): what, why, how.

Success Indicators (1-Year Horizon) What outcomes or shifts will show progress?

The Path Forward

How we'll bring it to life.

Section

Prompts / Examples

Key Enablers

What systems, capabilities, or mindsets make this real?

e.g. "Cross-functional leadership forums," "Data transparency," "Empowerment at mid-levels."

Leadership Commitments

What you'll personally model.

e.g. "Lead through visibility," "Reward collaboration," "Be transparent about tradeoffs."

Next 90 Days Focus

Tie back to the Quick Wins Tracker.

e.g. "Embed communication cadence," "Launch process simplification sprint," "Celebrate early adopters."