

# 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
<b>Key Enablers</b>	What systems, capabilities, or mindsets make this real? <i>e.g. "Cross-functional leadership forums," "Data transparency," "Empowerment at mid-levels."</i>
<b>Leadership Commitments</b>	What you'll personally model. <i>e.g. "Lead through visibility," "Reward collaboration," "Be transparent about tradeoffs."</i>
<b>Next 90 Days Focus</b>	Tie back to the Quick Wins Tracker. <i>e.g. "Embed communication cadence," "Launch process simplification sprint," "Celebrate early adopters."</i>