

**Our Mission:**

**Our Vision:**

**Our Values:**

**Objectives**

12 months

1.

2.

3.

4.

5.

**Sales plan**

12 months

1.

2.

3.

4.

5.

**Marketing plan**

12 months

1.

2.

3.

4.

5.

**Actions**

12 months

**Q1**

**Q2**

**Q3**

**Q4**

**2-3 years**

1.

2.

3.

**2-3 years**

1.

2.

3.

**2-3 years**

1.

2.

3.

Our **Mission:** *Why does this business exist? This is what your business does & how it may differ from your competitors?*

Our **Vision:** *What are you building? This is what your business aspires to be & will help drive your decisions & goals.*

Our **Values:** *Values are the core principles, beliefs or philosophies of the business. These support your vision & shape the business' culture.*

**Objectives**

12 months

*What are the key objectives for the business for the next 12 months in terms of growth, expansion, sales, recruitment?*

**Sales plan**

12 months

*List the top sales initiatives required to achieve your 12 month objectives*

*e.g. referral sources, sales staff, pipeline management.*

**Marketing plan**

12 months

*List the top marketing initiatives required to achieve your 12 month objectives.*

*e.g. database marketing, B2B marketing, client referral program, calendar of events.*

**Actions**

12 months

**Q1**

*List specific actions required, by whom and by when, to achieve those plans.*

**Q2**

**Q3**

**Q4**

**2-3 years**

*What are the medium-term objectives over the next 2-3 years?*

**2-3 years**

*What sales planning is required 2-3 years from now?*

**2-3 years**

*What marketing planning is required 2-3 years from now?*