



Strategic Planning Process

1. Define Annual Goals

- Identify three priorities for the year. Each department can do the same aligning with the company priorities.
- Make them specific and measurable (e.g., “increase revenue by 20%. (review your SMART goals).

2. Break Goals into Quarterly Objectives

- Divide each goal into smaller, actionable steps to complete this quarter.
- Focus on three to five priorities per quarter.

3. Set Key Performance Indicators(KPI's)

- Choose 3-5 metrics that measure progress (e.g., revenue, lead generation, customer satisfaction).
- Ensure data is trackable and easy to monitor.

4. Create a 90-Day Action Plan

- List the key tasks needed to achieve quarterly objectives.
- Assign owners for each task and set deadlines.

5. Define Accountability and Roles

- Clarify responsibilities for each team member to ensure accountability.
- Assign specific tasks and deadlines to team leads.

6. Allocate Budget and Resources

- Identify tools, budgets, and staffing required to execute the plan.

7. Monitor Progress and Adjust

- Review progress weekly or monthly.
- Make adjustments if goals shift or priorities change.



EXAMPLE STRATEGIC PLAN

Business Name: ABC Marketing Agency

Date: January 1, 2025

Annual Goals (Top 3 Priorities for the Year):

1. Increase revenue by 20% by expanding into two new industries.
2. Grow the email subscriber list by 5,000 contacts.
3. Launch a new social media management service by Q3.

Quarterly Objectives (Key Priorities for This Quarter):

1. Identify and target two new industries—healthcare and e-commerce.
2. Generate 1,500 new email subscribers through lead magnets and ad campaigns.
3. Develop and test a beta version of the social media management service.

Key Performance Indicators (KPIs):

1. Revenue increase of 5% by end of Q1.
2. 1,500 new email subscribers added by March 31.
3. Completion of beta testing for the new service by April 15.

Action Steps (Next 90 Days):

- *Goal 1: Expand into two new industries.*
 - Task 1: Research and compile a list of 50 target companies in healthcare and e-commerce. (Owner: Marketing Lead – Deadline: Jan 31)
 - Task 2: Create tailored sales materials for each industry. (Owner: Content Team – Deadline: Feb 15)
 - Task 3: Launch targeted ad campaigns. (Owner: Digital Ads Manager – Deadline: March 1)
- *Goal 2: Grow email subscriber list.*
 - Task 1: Design and publish 3 new lead magnets (e-books, templates, webinars). (Owner: Content Manager – Deadline: Feb 10)
 - Task 2: Set up and test email capture funnels. (Owner: Tech Team – Deadline: Feb 20)
 - Task 3: Launch paid ads to drive traffic. (Owner: Digital Ads Manager – Deadline: March 15)
- *Goal 3: Test new social media service.*
 - Task 1: Outline service packages and pricing models. (Owner: Product Lead – Deadline: Jan 15)
 - Task 2: Offer beta testing to 5 existing clients. (Owner: Sales Team – Deadline: Feb 28)
 - Task 3: Collect feedback and refine the service. (Owner: Operations Lead – Deadline: March 31)

Team Accountability: Roles and Responsibilities

- Leader/Owner: Sarah Jones – Oversee strategy execution and review progress.
- Marketing Lead: John Smith – Drive marketing campaigns and industry research.
- Content Manager: Emily Davis – Develop materials and lead magnets.
- Digital Ads Manager: Mike Taylor – Manage paid ads and email funnels.
- Operations Lead: Rachel Green – Ensure timelines are met and processes run smoothly.

Budget and Resources:

- \$10,000 allocated for paid ads in Q1.
- \$5,000 for lead magnet design and development.
- \$7,000 for beta testing and tool development for the new service.

Key Deadlines:

- Goal 1: Research and outreach completed by March 15.
- Goal 2: Subscriber growth target hit by March 31.
- Goal 3: Beta testing finalized and refined by April 15.

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COMPANY ANNUAL GOALS

Use the SMART goals you created from the other template

QUARTERLY OBJECTIVES

GOAL # 1

Break down the goals into smaller, achievable milestones. Be sure to include a deadline.

KPI

How will you track progress and measure success?

ACTIONS STEPS

In the next 90 days, what specific tasks need to happen and who is owning it?

GOAL # 2

Break down the goals into smaller, achievable milestones. Be sure to include a deadline.

KPI

How will you track progress and measure success?

ACTIONS STEPS

In the next 90 days, what specific tasks need to happen and who is owning it?

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QUARTERLY OBJECTIVES

GOAL # 3

Break down the goals into smaller, achievable milestones. Be sure to include a deadline.

KPI

How will you track progress and measure success?

ACTIONS STEPS

In the next 90 days, what specific tasks need to happen and who is owning it?

GOAL # 4

Break down the goals into smaller, achievable milestones. Be sure to include a deadline.

KPI

How will you track progress and measure success?

ACTIONS STEPS

In the next 90 days, what specific tasks need to happen and who is owning it?
