



Strategic Plan Format

As with a business plan, there is no specific template for a strategic plan that must or should be used in every instance. Every business, of course, is different and in a different stage of its organizational life cycle. If a business is only using the strategic plan for internal purposes rather than seeking external investors or financing, then some sections listed below might be omitted or other areas included that are of major importance to the company. Priority of items should always be taken into consideration. As you gain consulting experience and are exposed to many different types of businesses, you will naturally be able to expand the following basic template.

- i** **Cover Page**
- ii** **Executive Summary**
 - a. Brief description of the business
 - b. Summary of important sections of the strategic plan
- iii** **Mission Statement and Vision Statement**
 - a. Mission statement: The purpose of the business, what it is doing today, and its main function (present-based)
 - b. Vision statement: How the business hopes to be viewed, what it stands for, and where it wants to be in the future (future-based)
- iv** **Goals and Objectives**
 - a. Short-term
 - b. Intermediate
 - c. Long-term (if feasible)
 - d. Factors necessary for success and how each is accomplished)
- v** **SWOT Analysis**
 - a. Important items in each category
 - b. Recommendations for each item listed

vi ***Operating/Action Plan***

vii ***Human Capital***

- a. Present organizational structure
- b. Future employee needs
- c. Training and recruitment

viii ***Target Market***

- a. Present
- b. Future potential

ix ***Marketing Plan***

- a. Present
- b. Future ideas

x ***Industry Analysis***

- a. Present
- b. Future predictions

xi ***Competitive Analysis***

- a. History of competition
- b. Current competition
- c. Potential competition
 - i. Strengths
 - ii. Weaknesses

xii ***Financial Projections***

- a. Projected income statements
- b. Capital asset projections
- c. Cash flow projections (if a major element)