

Strategic Plan v1.0 — <X> Session

Contract summary

Goal: Develop comprehensive strategic plan with actionable steps.

Constraints: Consider resource limitations; include a timeline; define measurable outcomes.

Success criteria: Produce an actionable plan; define clear milestones; generate success metrics.

Assumptions & scope

- Domain-agnostic plan intended for an organization/program “X”. Replace placeholders with your specifics (team, product, market, geography).
- Resource-lean approach optimized for small cross-functional squads and limited budget.
- 12-week horizon with weekly granularity; can be compressed to 8 or stretched to 16 weeks.

Core roles (minimum viable): - Sponsor/SteerCo (0.1 FTE), Program Lead/PM (0.5), Analyst (0.5), 1–2 SMEs (0.2–0.4 each), Comms/Change (0.2).

Cadences: Weekly working session; bi-weekly steering; daily async updates in PM tool.

Phase 1 — Situational Analysis (Weeks 1–3)

Operation 1.1: Assess current state (comprehensiveness: full)

Objectives

Create a shared understanding of today’s processes, technology, people, risks, and performance.

Actions 1) Spin up workspace & RACI; confirm decision rights.

2) Rapid document sweep: strategy decks, OKRs, budget, org charts.

3) 360° interviews (15–25): leadership, operators, customers/partners.

4) Process & tech inventory (systems map, data flows, pain points).

5) Baseline metrics: availability, cycle time, quality, cost, adoption, NPS/CSAT (as relevant).

6) Synthesize SWOT + “five whys” on top pain points.

7) Summarize constraints (budget, headcount, compliance, timelines).

Deliverable

Current State Report (exec summary, key insights, baseline KPIs, risks & constraints).

Quality bar

≥90% document coverage; ≥80% stakeholder coverage; baselines for ≥5 core metrics.

Operation 1.2: Identify stakeholders (scope: all_relevant)

Stakeholder map (template)

Name/Role	Influence	Interest	Expectations	Preferred channel	RACI
Sponsor	High	High	Clear ROI, risk control	Steering (bi-weekly)	A
Ops Lead	High	High	Less rework, faster cycle	Weekly stand-up	R
Finance	Med	Med	Budget adherence	Monthly	C
...

Comms plan: Who hears what, when, where; decision log; escalation path.

Phase 2 — Goal Setting (Weeks 3–4)

Operation 2.1: Define objectives (framework: SMART)

Draft 3–5 SMART objectives aligned to constraints & baseline.

Example (replace with your specifics): - **O1:** *By Week 4*, deliver a board-ready **Strategic Plan v1.0** approved by Sponsor.

- **O2:** *By Week 5*, select **top 5 strategies** prioritized by impact/feasibility with clear owners.

- **O3:** *By Week 5*, stand up a **measurement framework** with baselines and 12-week targets for ≥ 6 KPIs.

Operation 2.2: Prioritize goals (method: weighted)

Weighted rubric (template)

Criterion	Weight	Scoring guidance
Strategic fit	25%	Directly advances org priorities/mandates
Expected impact	30%	Value delivered in 12 weeks (revenue, savings, risk)
Effort/cost (inverse)	20%	People, time, budget to deliver
Risk/complexity (inverse)	15%	Dependencies, compliance, change load
Time-to-value	10%	Earliest measurable improvement

Formula: Score = $\Sigma(\text{weight} \times \text{normalized}_{0-5})$. Sort descending to get the draft priority list.

Phase 3 — Strategy Development (Weeks 4–6)

Operation 3.1: Generate strategies (approach: multi_path)

Ideate across **People, Process, Technology, Data, Governance**. Capture for each: problem, hypothesis, value, owner, effort, risks, dependencies.

Illustrative strategies (edit to fit): - **S1 (Process):** Lean redesign of top-volume workflow to cut cycle time 30–40%.

- **S2 (Technology):** Introduce lightweight automation for repetitive tasks; target 25% effort reduction.

- **S3 (Data):** Build KPI dashboard with near-real-time signals; use for weekly decisions.

- **S4 (People):** Role clarity + micro-training to reduce handoff errors 50%.

- **S5 (Governance):** Two-tier change board to unblock <2-day decisions.

Operation 3.2: Evaluate options (criteria: feasibility, impact)

Plot on an **Impact × Feasibility** matrix; apply weighted rubric; run a 60-min challenge session to pressure-test assumptions; pick the **Top 5**.

Deliverable: *Prioritized Strategy Shortlist* (top 5 with rationale, effort bands, owners, risk profile).

Phase 4 — Implementation Planning (Weeks 6–12)

Operation 4.1: Create action plan (detail: operational)

For each selected strategy, define **workstreams** → **tasks** with: owner, start/end, effort (S/M/L), dependencies, acceptance criteria.

Workstream template

Strategy	Task	Owner	Start	End	Effort	Dependencies	Acceptance criteria
S1	Map current steps	Analyst	W6	W6	S	Stakeholder buy-in	Steps validated by Ops Lead
S1	Redesign & pilot	Ops Lead	W7	W8	M	Map complete	20% cycle-time reduction in pilot
S2	Identify candidates	SME	W6	W6	S	—	3 high-volume tasks selected

Strategy	Task	Owner	Start	End	Effort	Dependencies	Acceptance criteria
S2	Build automation	Eng	W7	W9	L	Tool access	25% effort reduction measured
S3	Define KPIs	PM	W6	W6	S	Baseline complete	KPI list approved
S3	Build dashboard	Analyst	W7	W8	M	KPIs defined	Dashboard live, weekly review
S4	Role charter	PM	W6	W7	S	Stakeholder input	RACI published
S4	Micro-training	Comms	W8	W9	S	Charter done	80% training completion
S5	Define gates	PM	W6	W6	S	Sponsor input	Gate definitions approved
S5	Run governance	Sponsor	W7	W12	S	Gates defined	<2-day decision SLA met

Operation 4.2: Define metrics (type: leading & lagging)

Leading indicators (weekly): - % stakeholder interviews complete (target $\geq 80\%$ by W2).

- % baseline datasets captured ($\geq 90\%$ by W3).
- # strategies ideated (≥ 20 by W4).
- % tasks “on track” in PM tool ($\geq 85\%$ each week).
- Training completion rate ($\geq 80\%$ by W9).

Lagging indicators (end of program): - Milestone hit rate ($\geq 90\%$).

- Cycle-time reduction ($\geq 20\%$ in pilot area).
- Effort reduction ($\geq 15\%$ on automated tasks).
- Quality/defect rate (-25%).
- Adoption/utilization ($\geq 70\%$ of target users).
- Budget variance ($\leq \pm 10\%$).

Measurement system

Weekly metrics review; dashboard updated by Monday 12:00; variances $>10\%$ trigger corrective actions.

Operation 4.3: Establish timeline (granularity: weekly)

12-Week Timeline (Gantt-style text) - W1: Kickoff, RACI, comms plan, doc sweep.

- **W2:** Interviews, baseline metrics, systems map.
- **W3:** Synthesis, SWOT, constraints review → *Milestone M1: Current State Report*.
- **W4:** SMART objectives; prioritization rubric final → *M2: Objectives Approved*.

- **W5:** Ideation + eval, impact×feasibility → *M3: Top 5 Strategies*.
 - **W6:** Action plan v1, resourcing, risk register → *Gate: Exec Readiness*.
 - **W7–W8:** Pilots/quick wins for S1–S3; dashboard live → *M4: Quick Wins Delivered*.
 - **W9–W10:** Scale/refine; training; SOP drafts.
 - **W11:** Integrate learnings; finalize v2.0.
 - **W12:** Handoff, sustainability plan, closeout → *M5: Final Review*.
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Milestones & approvals

- **M1 (W3):** Current State Report signed off by Sponsor.
 - **M2 (W4):** SMART Objectives approved.
 - **M3 (W5):** Strategy shortlist (Top 5) ratified.
 - **M4 (W8):** Quick wins delivered and measured.
 - **M5 (W12):** Final review & sustainment plan approved.
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Risks & mitigations (top 8)

- 1) **Stakeholder availability** → Lock calendars W1; async surveys as fallback.
 - 2) **Data gaps/quality** → Define proxies + manual sampling W2–W3.
 - 3) **Change fatigue** → Micro-training + comms; limit concurrent changes.
 - 4) **Tool access delays** → Pre-approve access in W1; use no-code backup.
 - 5) **Scope creep** → Change control via governance gate; budget guardrails.
 - 6) **Dependency slippage** → Dependency register; SLA; escalation path.
 - 7) **Regulatory constraints** → Early legal/compliance review W2.
 - 8) **Under-resourcing** → Re-prioritize to top 3 strategies; extend timeline.
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Governance & ways of working

- **Steering (bi-weekly):** Sponsor + Leads; decisions on scope, funding, risks.
 - **Working group (weekly):** Task review, blockers, metrics.
 - **Decision log:** Owner, date, rationale, effect.
 - **Definition of done:** Each deliverable has acceptance criteria and a sign-off owner.
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Success metrics & thresholds (for this plan itself)

- **Plan quality:** All sections complete; cross-referenced; risks/mitigations documented.
 - **Actionability:** 90% of tasks have owner, start/end, acceptance criteria.
 - **Timeliness:** M1–M5 achieved per timeline.
 - **Measurability:** ≥6 KPIs with baselines and targets; dashboard live by W8.
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Appendices

- **A:** Prioritization rubric calculator (weights & scoring guide).
- **B:** RACI (detailed).
- **C:** Metric dictionary (operational definitions & data sources).
- **D:** Change & comms plan (audiences, messages, channels, cadence).
- **E:** Risk register (full list with owners & responses).

How to tailor quickly: Replace placeholders, confirm constraints, set KPI baselines, then lock Milestones (M1–M5). Save as v1.1 and publish to your PM tool.