# 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 = Σ(weight × 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 |
| 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 ≥80% by W2).  
- % baseline datasets captured (≥90% by W3).  
- # strategies ideated (≥20 by W4).  
- % tasks “on track” in PM tool (≥85% each week).  
- Training completion rate (≥80% by W9).

**Lagging indicators (end of program):** - Milestone hit rate (≥90%).  
- Cycle‑time reduction (≥20% in pilot area).  
- Effort reduction (≥15% on automated tasks).  
- Quality/defect rate (−25%).  
- Adoption/utilization (≥70% of target users).  
- Budget variance (≤±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*.

## 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.

## 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.

## 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.

## 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.

## 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.