



# Strategic Planning Template

Get to grips with your own strategic plan with our handy guide.

## Executive Summary

Provide an overview of your business and include the time period you're looking at in the strategic plan.

## The Company

**Vision Statement:** Describe the direction your company is headed in and what your company stands for and aims to be.

**Mission Statement:** Similar to a vision statement, but includes more specific details on actions. Details what your company does and explains to people outside of your company why your business exists.

**Values:** Explains your business stands for. Values typically help guide the culture within your business.

**Management /Leadership:** Who is/are the leaders of the business.

## Research

**Clients/Customers:** Describe the customers you cater to.

**Competitors:** Who are the main competitors within your industry?

**Industry:** What industry is your business in?

## Products and Services

**Products:** Describe the products you offer (if any).

**Services:** Describe the types of services you offer to your customers (if any).

**Suppliers:** Describe or note any suppliers your business has a relationship with.

**Delivery System:** Describe or explain how services or products from your business are delivered.

## Measurable Goals and Objectives

Goal/Objective 1: Describe a goal or objective you want the business to achieve.

Goal/Objective 2: Describe a goal or objective you want the business to achieve.

## Action Plans

Methods and details outlining how the business will achieve each of the goals and objectives above.

## Review and Updating

Explain how often the strategic plan should be reviewed and updated. List out the people in the business responsible for reviews and updates, as well as communicating the changes with the rest of the company.



**SMALLBIZ  
AHEAD**

Ready to get started? Fill out your own strategic plan below:

### Executive Summary

### The Company

### Research

## Products and Services

## Measurable Goals and Objectives

## Action Plans

## Review and Updating