



Capacity Building
Solutions

STRATEGIC PLAN TEMPLATE





INTRODUCTION

A good strategy doesn't have to be complicated—but it does have to be clear. Too often, business owners create long, detailed plans that end up sitting on a shelf, unused and forgotten. The real challenge isn't writing more—it's distilling your vision, priorities, and action steps into a format that can be understood, communicated, and executed every day.

That's exactly what this **Strategic Plan Template** is designed to do. It helps you cut through the clutter and capture the essentials: your mission, vision, and values; the core strategy that defines how you'll compete; the critical success factors shaping your environment; and the key obstacles standing in your way. It then pushes you to translate strategy into measurable goals, clear success metrics, and specific action items with ownership attached.

The goal isn't just to have a plan—it's to have a plan you'll actually use. By filling out this template, you'll create a roadmap that's simple enough to keep top of mind, yet robust enough to guide your team's decisions and actions over the next 1–3 years. A strategic plan only matters if it drives execution. This tool gives you a practical way to align your team, track progress, and keep everyone focused on what matters most.

Mission Statement – Why are you in business (no more than 1-2 sentences)?

Vision/Direction – What are you striving to achieve over the next 3 Years (no more than 1-2 sentences)?

Core Values – What are your cultural non-negotiables (no more than 3-5 values)?

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What Is Our Core Strategy – How are we going to position the company for success?

► **Options (one must dominate):**

- ☐ **Operational Excellence** - The team focuses on how it can organize and create predictability, reliability, low cost, and structure
- ☐ **Customer Intimacy** - The team focuses on the customer and delivering to the customer, resulting in customization and tailoring to customer needs
- ☐ **Superiority** - The team focuses on creating superiority of product or service, uniqueness, one-of-a-kind
- ☐ **Enrichment** - The team focuses on fulfilling human potential, helping create better lives for the customer and offering self-actualization

Competitive Positioning – How do you plan on differentiating yourself from your competition? Why are you the preferred alternatives (no more than 1-2 sentences)?

Critical Success Factors/Key Assumptions – What are the major market/business issues currently affecting your business environment (no more than 5-7 key issues)?

- ☐ Macroeconomic?

☐ Industry Specific?

☐ Market Specific?

☐ Other?

What Are Our Internal Obstacles to Success?

☐ People?

☐ Process?

☐ Technology?

☐ Resources?

☐ Other?

Success Metrics/Key Performance Indicators – How do you plan on measuring/tracking success on a regular and timely basis (no more than 5-7 metrics)?

☐ Financial?

☐ Operational?

☐ Customer?

☐ Workplace/Employee?

☐ Other?

Strategic Goals - What major objectives are critical to your success over the next 1-3 years (no more than 5 major objectives)? Who is Responsible and Accountable for Each One?

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Major Action Items – What actions are essential to the achievement of your strategic objectives over the next year? Who is Responsible and Accountable for Each One?

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Source: Capacity Building Solutions Inc. – www.capacity-building.com

Strategic Goals	Completion Date	Responsible Party
1.		
2.		
3.		
4.		
5.		
6.		
7.		

Strategic Goal #1:

Major Action Item	Completion Date	Responsible Party

Strategic Goal #2:

Major Action Item	Completion Date	Responsible Party