



## Quarterly Strategic Plan Template

Quarter Covered: \_\_\_\_\_

Quick List Your Company's Most Important Goals for Year:

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Looking at those goals, work backwards. What will you need to have accomplished this quarter to reach those goals?

**What are the THREE most important strategic objectives for your business to focus on and accomplish this quarter?** (Important: Be realistic about what you can accomplish in this 90 day time period. Ambitious is fine, but you want to set yourself up to succeed. It's fine to stretch BIG in your 3 or 5 year goals, but you should know in your gut that you have a great shot of hitting your 90 day strategic outcomes.

**Bottom Line: Be clear; be realistic; choose the most important outcomes for your BUSINESS to focus on over the next 90 days.**

Strategic Outcome #1:

Strategic Outcome #2:

Strategic Outcome #3:

Now you need to flesh out your miles stones and action plans to reach and achieve your strategic objectives.

**I., II., III.: Your Business's Top 3 Strategic Objectives for Quarter(clear, realistic, and most important).**

**A., B., C.:** Then you'll lay out the 1-3 "milestones" to hit that if you hit them give you great odds to accomplish your strategic objective.

- Date specific
- Primarily within your control
- Ideally behavioral (we could watch you do it or hear you say it)
- Concrete and clear

**1,2,3,4,5:** Finally you'll have your 1-5 concrete action steps to reach each of your milestones. These must be:

- Behavioral (we could watch you do it or hear you say it)
- Date specific (when will you have taken these steps by—you are creating a deliverable you are committed to—open to change if you feel the situation warrants, but still, these are concrete commitments.)
- Within your control.

This is a proven template for you to use. Feel free to modify it to best meet your company's needs.

We do want to make sure that your quarterly Strategic Plan is clear, concrete, date specific, and realistic.

And we also want to make sure that you have drilled down to the key action steps you need to take that will give you the best odds of success. These action steps need to be behavioral and totally in your control. Having clear action steps is especially important if you're the type of person who has had past tendencies to feel overwhelmed, to procrastinate, or to get pulled off track. Getting clear on your action steps will make it incredibly easier for you to keep on track and moving forward.

## **I. Strategic Outcome #1:**

### **A. Milestone One:**

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)

### **B. Milestone Two:**

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)

### **C. Milestone Three:**

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)

## **II. Strategic Outcome #2:**

### **A. Milestone One:**

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)

### **B. Milestone Two:**

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)

### **C. Milestone Three:**

1. Action Step
2. Action Step
3. Action Step

4. (Action Step)
5. (Action Step)

### **III. Strategic Outcome #3:**

#### A. Milestone One:

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)

#### B. Milestone Two:

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)

#### C. Milestone Three:

1. Action Step
2. Action Step
3. Action Step
4. (Action Step)
5. (Action Step)