One-Page Strategic Plan
# One-Page Strategic Plan

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Your Name</th>
<th>Date</th>
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## Core Values/Beliefs
(Should/Shouldn’t)

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## Purpose
(Why)

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## Targets (3-5 yrs.)
(Where)

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### Sandbox

## Goals (1 yr.)
(What)

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### Actions
To Live Values, Purpose, BHAG

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### Key Thrusts/Capabilities
3 – 5 Year Priorities

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### Key Initiatives
Annual Priorities

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### BHAG

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### KPIs/Smart Numbers

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### Brand Promise

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### 1 or 2 Critical #s

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### Actions (QTR) (How)

<table>
<thead>
<tr>
<th>Qtr. #</th>
<th>Revenues</th>
<th>Profit</th>
<th>Mkt Cap</th>
<th>Gross Margin</th>
<th>Cash</th>
<th>A/R Days</th>
<th>Inv. Days</th>
<th>Rev./Emp.</th>
</tr>
</thead>
</table>

### Theme (QTR/Annual)

<table>
<thead>
<tr>
<th>Deadline</th>
<th>Measurable Target/Critical #</th>
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### Your Accountability (Who/When)

<table>
<thead>
<tr>
<th>Your Quarterly Priorities</th>
<th>Due</th>
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<tbody>
<tr>
<td>1</td>
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<tr>
<td>2</td>
<td></td>
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<tr>
<td>3</td>
<td></td>
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<tr>
<td>4</td>
<td></td>
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<tr>
<td>5</td>
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#### Rocks

Quarterly Priorities

1. 
2. 
3. 
4. 
5. 

Prioritize your Rocks.

#### Opportunities to exceed plan

1. 
2. 
3. 
4. 
5. 

#### Threats to making plan

1. 
2. 
3. 
4. 
5. 

#### Scoreboard Design

Describe and/or sketch your design in this space.

#### Theme Name

________________________

#### 1 or 2 Critical #s

________________________

________________________

________________________

### Celebration/Reward

________________________

________________________

________________________

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Rockefeller Habits

Checklist

Name __________________ Company ___________________ Date ______________

1) Everyone aligned with #1 thing that needs to be accomplished this quarter to move company forward
   ☐ 5 priorities (Rocks) are identified and ranked for the quarter
   ☐ A Critical Number is identified and aligns with the #1 priority
   ☐ A Quarterly Theme is established that brings the key priority/Critical Number alive
   ☐ A scoreboard for the Critical Number is posted and Theme announced
   ☐ All employees know what the Celebration/Reward will be

2) Communication rhythm is established. Information moves through organization accurately and quickly
   ☐ All employees are in some kind of a daily and weekly huddle
   ☐ Huddles cascade from senior management to frontline or visa versa

3) Every facet of the organization has a person assigned with accountability for ensuring goals are met
   ☐ Income (P&L), Cash Flow, & Balance Sheet statements have persons assigned to each line item
   ☐ An accountability chart has been created

4) Ongoing employee feedback and input is systematized to remove obstacles and identify opportunities
   ☐ Employee hassles/ideas/suggestions/issues are being collected weekly
   ☐ There is a systematic process for addressing issues and opportunities
   ☐ Thank You cards are being written every week by senior management

5) Reporting and analysis of Customer Feedback data is as frequent and accurate as financial data
   ☐ All employees are involved in collecting customer data
   ☐ There is a person assigned accountability for customer feedback
   ☐ All senior leaders communicate with at least one customer weekly

6) Core ideologies are "alive" in the organization
   ☐ Core ideologies are discovered and defined
   ☐ Stories are being shared of employees who represent the ideologies
   ☐ Core ideologies are included in appraisal and recognition processes

7) Clear understanding of the firm's market position drives strategic planning and sales and marketing
   ☐ Brand Promise and market (Sandbox) are clearly defined
   ☐ The organization is aligned around 5 key strategies (Thrusts/Capabilities) for growth

8) All employees can report at any time what their productivity is and how it compares against goals
   ☐ Smart Numbers (key performance indicators) are identified for the organization
   ☐ Weekly measures for each individual/team are clearly displayed and reviewed

9) A "situation room" is established for the weekly executive team meeting
   ☐ Smart Numbers and Critical Numbers are posted bigger than life with goals clearly shown
   ☐ Data is presented graphically to help visualize trends
   ☐ Core ideologies, priorities, and market maps posted

10) As goes the Executive Team goes the rest of the firm
    ☐ Team members understand each other's differences, priorities, and styles
    ☐ The team meets offsite every few months for strategic thinking and renewal
    ☐ The team is having fun together