

# PLAN SETUP WORKSHEET

**1** Who are you developing the strategic plan for?

- Entire Organization    
  Single Department/Division

**2** What is the structure of your organization? Does your organizational structure look more like 1, 2, 3 or 4 levels?

1 level                     
  2 levels                     
  3 levels                     
  4 levels

**3** What is the hierarchy of your organization that you will engage in the process? Identify the levels in your organization.

Check only those that apply	Organizational levels	Name of levels in your organizational structure (i.e. Division, Departments, Managers, Team Members, Workgroups, etc.)	Number of users at each level in your organization
<input type="checkbox"/>	Top Level		
<input type="checkbox"/>	2nd Level		
<input type="checkbox"/>	3rd Level		
<input type="checkbox"/>	4th Level		

STRUCTURE EXAMPLE

TOP LEVEL ORGANIZATIONAL PLAN

2ND LEVEL DEPARTMENTS

3RD LEVEL TEAM MEMBERS

4TH LEVEL NONE

**4** What is your desired timeframe for the plan?

- 3 years    
  5 years    
  10 years+

**5** What is your role in the organization?

- Executive Leader    
  Administrative Assistance    
  Strategic Planning Director  
 Department Manager    
  Team Member    
  Other

**6** Other comments or questions: \_\_\_\_\_

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