

Strategic Plan Worksheet

*Use the instructions provided to lead you to creating your Strategic Plan. Use this worksheet in conjunction with the **Action Plan Worksheet**.*

Your strategic plan tells you month-to-month, week-to-week, and therefore day-to-day where to focus your creative energy. It will become your step-by-step map of how you will reach your milestones.

(1) Your Inspired Goal is:

[Insert your 10- to 30-Year Inspired Goal Here.]

(2) Your Key Milestones:

- ***[Insert your Key Milestones Here.]***
- ***[Insert your Key Milestones Here.]***
- ***[Insert your Key Milestones Here.]***
- ***[Insert your Key Milestones Here.]***
- ***[Insert your Key Milestones Here.]***
- ***[Insert your Key Milestones Here.]***
- ***[Insert your Key Milestones Here.]***

(3) Your weekly time commitment:

[How many hours per week you are willing to invest in creating and executing your plan.]

(4) Your weekly schedule:

[Insert your weekly schedule of when you will work on and execute your plan – time should add up to #3.]

(5) This Year's Targeted Milestones:

Taking into consideration the amount of time you just committed to following your plan, take a look at your milestones and from the gut, just ask yourself, which milestones do you think you will be able to accomplish in the next 12 months. Just take a loose, yet realistic guess. Depending on your list, it might be 1 milestone or several. Just trust your instinct on what's possible in the next 12 months. **Enter the milestones below:**

- *[Insert your Key 2005 Milestone Here.]*
- *[Insert your Key 2005 Milestone Here.]*
- *[Insert your Key 2005 Milestone Here.]*

Now allow yourself to put the above milestones in a loose chronological order (first, second, third, fourth.) If there's only one milestone, that's okay too. You have the luxury of focusing on one key milestone this year. Identify general timeframes, again, from your gut.

(6) Your Near-Term Focus Milestones:

Now, look out over the next 3-5 months. Identify the milestones that will fit in that timeframe. If only one fits in that time frame, great. If not, then identify which ones you will expect to come into fruition in the next 3-5 months. Ideally, you will only want one or two milestones in a 3-5 month planning horizon. Enter your near-term focus milestone(s) in the box below.

If your first milestone is on a longer time horizon (longer than 3-5 months to complete), then break that milestone down into smaller key goals. Next, identify the 1 or 2 key goals that you will be working on in the coming 3-5 months.

. **Enter the milestones below:**

- **MILESTONE #1:** *[Insert your Key 2005 Milestone Here.]*
- **MILESTONE #2:** *[Insert your Key 2005 Milestone Here.]*

The milestone(s) entered above will be the focus of the remainder of the this worksheet. For each of the above milestones, you will develop a detailed plan.

(7) Planning For Milestone #1:
[Insert Milestone #1 here.]

Here you can focus attention on your first milestone and create your plan for it.

My recommendation is to always work on one milestone at a time. This way, you will most effectively utilize your creative energy.

(8) The first step is brainstorming the “big elements.”

Take 20-30 minutes and just start brainstorming everything you would need to create, have, and do, in order for you to reach that one milestone. Don't worry about chronology; just start listing everything that would be required to complete the milestone.

Assume your first milestone is to sell your first product, your big picture brainstorm might include the following:

- Product development
- Packaging
- Logistics
- Marketing
- Quality Assurance
- Customer Support

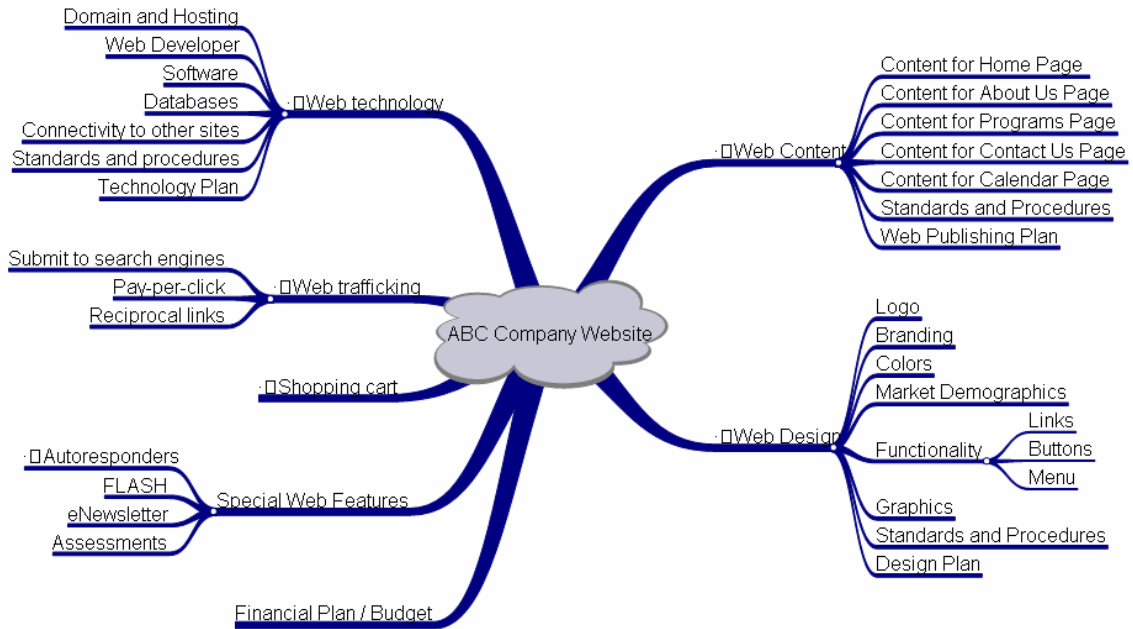
Or if your first milestone is to develop a website, your big picture elements might include:

- Web Content
- Web Design
- Web technology
- Web trafficking
- Shopping cart
- Autoresponders
- Any special web features



I recommend thinking about all the “big picture” elements or components first, and then breaking those big picture elements down further.

Here is an example of the brainstorming process:



Brainstorm your first milestone here...(use additional paper if needed)....



(9) The next step is defining all the required actions for each item brainstormed. Use the *Action Plan Worksheet* to track all your actions.

For Example, take a branch from your brainstorm web



...and break it down into a list... (only list the actions... don't list the order, person assigned, time required, or dates yet)... Here's an example below...

Order	Action Step	Person Assigned	Time Required	Scheduled Dates to Take Action	Actual Completion Date
	Outline, write and proofread content for Home Page				
	Outline, write and proofread content for About Us Page				
	Outline, write and proofread content for Programs Page				
	Outline, write and proofread content for Contact Us Page				
	Investigate options for putting a "Contact Form" onto the Contact Us Page				
	Determine what I would want to have included on the Contact Us Form				

	(Name, email, etc.)				
	Have my web content proof read by a copy editor				
	Finalize the copy for all the web pages				
	Submit copy to my web designer				
	Investigate options for setting “Standards and Procedures” for web copy				
	Define and document my “Standards and Procedures” for web copy				
	Investigate options for a “Web Publishing Plan”				
	Define and document my “Web Publishing Plan,” including the frequency of updates, etc.				

Go ahead and enter your action steps into the Action Plan Worksheet now.

(10) Go through your list and see if some of the items on your list needs to be broken down further into more manageable action steps. At the same time, don’t break the actions down so far that following your plan will feel ridiculous.

Remember that every action requires time to “design, build, test, and deploy.” So make sure you include this in your action steps.

(11) The next step is assigning a person to each of the action steps. It may be the case that all the actions are assigned to you. If not, it’s important to note that on your Action Plan Worksheet.

Here’s an example:

Order	Action Step	Person Assigned	Time Required	Scheduled Dates to Take Action	Actual Completion Date
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	Outline, write and proofread content for Home Page	Coco			
	Outline, write and proofread content for About Us Page	Coco			
	Outline, write and proofread content for Programs Page	Coco			
	Outline, write and proofread content for Contact Us Page	Coco			
	Investigate options for putting a “Contact Form” onto the Contact Us Page	Coco			
	Determine what I would want to have included on the Contact Us Form (Name, email, etc.)	Coco			
	Have my web content proof read by a copy editor	Copy Editor			
	Finalize the copy for all the web pages	Coco			
	Submit copy to my web designer	Web Designer			
	Investigate options for setting “Standards and Procedures” for web copy	Coco and Web Expert			
	Define and document my “Standards and Procedures” for web copy	Coco			
	Investigate options for a “Web Publishing Plan”	Coco and Web Expert			
	Define and document my “Web Publishing Plan,” including the frequency of updates, etc.	Coco			

(12) The next step is putting your actions steps in chronological order. Identify what you will do first, second, third, fourth, etc.

Here's an example:

Order	Action Step	Person Assigned	Time Required	Scheduled Dates to Take Action	Actual Completion Date
1	Outline, write and proofread content for Home Page	Coco			
2	Outline, write and proofread content for About Us Page	Coco			
3	Outline, write and proofread content for Programs Page	Coco			
4	Outline, write and proofread content for Contact Us Page	Coco			
Etc...					

(13) The next step is estimating how long it will take to complete each action step. Determine how many hours it will take for you to complete each action step.

If you're not sure how much time it will take to complete a certain action, make a very conservative guess on the amount of time required, and include the necessary actions in your plan to do research, learn a skill, ask others for help, etc. If other people are handling some of the action steps, be sure to ask them for their time estimate. This way you will manage expectations and achieve buy-in from everyone involved.

Here's an example:

Order	Action Step	Person Assigned	Time Required	Scheduled Dates to Take Action	Actual Completion Date
1	Outline, write and proofread content for Home Page	Coco	2 hours		

2	Outline, write and proofread content for About Us Page	Coco	4 hours		
3	Outline, write and proofread content for Programs Page	Coco	3 hours		
4	Outline, write and proofread content for Contact Us Page	Coco	2 hours		
Etc...					

(14) The next step is to add dates. Assume that you will be able to take actions on your plan **starting Monday April 18**. This will give you time to complete the planning process and then move along into the execution piece.

You already know the amount of time you have committed to building your business each week, so you can see, realistically, how long it will take you to take each action and reach your first milestone.

Here's an example:

Assuming I commit to working on my plan 10 hours per week, and I start on Monday, April 18

Order	Action Step	Person Assigned	Time Required	Scheduled Dates to Take Action	Actual Completion Date
1	Outline, write and proofread content for Home Page	Coco	2 hours	April 18	
2	Outline, write and proofread content for About Us Page	Coco	4 hours	April 19 – 20	
3	Outline, write and proofread content for Programs Page	Coco	2 hours	April 21	
4	Outline, write and proofread content for Contact Us Page	Coco	2 hours	April 22	
Etc...					



From this exercise, you will have a good idea of when your first milestone will be complete, based on the time you are contributing, the scope of your milestone, and the resources you are directing towards it.

(15) The next step is to make any adjustments to your plan. If your plan tells you that your first milestone will take you considerably longer than you would like – then you have a choice – you can either increase the amount of time you spend taking actions on your plan, you can invest in other resources (web designers, an assistant, or some kind of technology) to speed up the process, or you can change the scope of what you are creating – like not include a Calendar Page, or not include a Contact Form on your website for right now.

Time – Resources – Scope – these are the three elements that are required for manifestation.

By maneuvering these three elements, you can create a plan that works for you – your time, your resources, and the scope you desire.

(16) The last step is making your plan easy to follow. For some of you, the action plan list is perfect. You can follow the dates exactly and then check them off whenever you complete the actions.

For others, the Action Plan worksheet is too rigid. If you are one of those people, I suggest translating your plan into a weekly plan. Feel free to use the **Action Plan By Week Worksheet** or any other format that works for you.