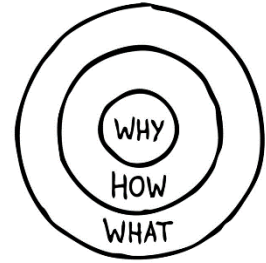


Strategic Planning through Tactical Execution – One Pager



Strategic planning begins at the top with the three master statements.

1. Vision Statement
 - a. Master “Why”: Defines why you are in business.
2. Values Statement (often called the Values Set)
 - a. Master “How”: Defines how you do business.
3. Mission Statement
 - a. Master “What”: Defines what your business does.



These three statements are called the MVV and are important because they define, at the very highest level, the Why, How, and What of your business.

From there we seek to *operationalize* those statements. The first step of operationalizing these statements is creating the End Statements. The MVV and End Statements are refreshed (if needed) annually.

End Statements are:

- Broad strategic goals
- Long-term expressions of What you would like to achieve (one to many years)
- Usually not easily measurable from the onset
- Best when written in bold, aspirational, dynamic, and exciting language
- Infused with the language of the MVV

As End Statements are long term goals, they are best broken down into shorter term goals which allow them to be more easily executed. By executed I mean tracked, budgeted, staffed, and completed.

Quarterly Goals are:

- The result of an effort that once completed yields a high likelihood of moving the organization closer to achieving an End Statement
- A more specific What than an End Statement
- Broader than an Objective
- Not necessarily easily measurable
- Tracked every three months

Objectives are:

- Specific results tied to goals, that if completed well, on time, and in sequence yield a high likelihood of achieving the goal to which they are tied.
- How you will achieve the Goal
- Best created using the SMART method (these must be measurable)
- Completed in a time frame shorter than quarterly. Generally, 4 – 40 hours per objective.
- Tracked weekly or more frequently

Action Items are:

- Sub steps or sub bullets to achieve an Objective
- Often called Check lists or Punch Lists
- Often templated to save time and assure quality
- Not needed for all Objectives