

The Complete Strategic Planning Toolkit



CASCADE

**“The best strategic
planning process I’ve
ever used.”**

Kobus Van Zyl - CEO, Mercedes Benz Africa

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Toolkit Overview

Thanks for downloading our free Strategic Planning Toolkit. This toolkit can be used standalone, or in conjunction with our popular free Strategic Planning 101 online training.

This toolkit is designed for people who:

- Have a rough idea of what they want to achieve for their organization
- Need help structuring their thoughts into a cohesive strategic plan
- Need some help and inspiration creating key aspects of their plan such as vision, values, focus areas, etc

If you haven't already, we strongly suggest starting a [free trial of Cascade](#) - the online strategy platform, which will give you all the tools you need to create your plan, alongside this toolkit.

By the end of this toolkit, you'll have:

- A vision statement
- A set of organizational values
- Strategic focus areas
- Strategic objectives, projects and KPIs
- A strategic framework in place

We hope you like the journey, and if anytime you need a little more help, check out the extensive free resources we have online at [executestategy.net](#) - enjoy!



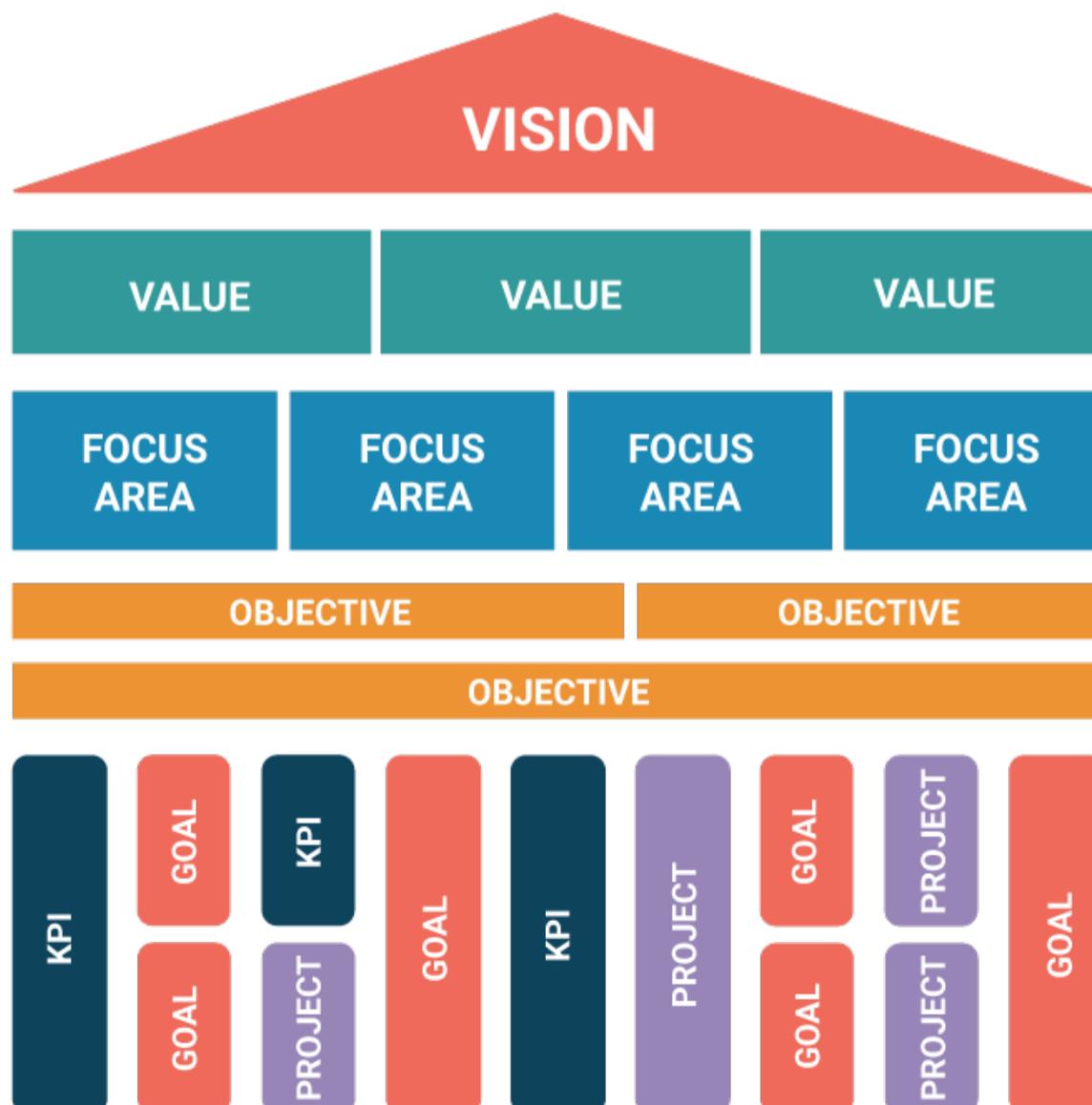
What Is A Strategic Plan

There are lots of different definitions of strategic plans, but we like the following:

A strategic plan determines where your organization is going over the next few years and how it's going to get there. A strategic plan is a coordinated and systematic way to develop a course and direction for your organization.

To be more specific, it's also helpful to think about a strategic plan in terms of an actual document - often referred to as the 'plan on a page'. It's also the output of this toolkit, in that once you've finished, you'll have a simple 'plan on a page' that you can socialize with other people.

Here are what we see as the key components of your strategic plan:



What Is A Strategic Plan

Let's dive into the different elements in the plan outline above:

Vision

Your vision statement is the pinnacle of your strategy. Everything in your plan should be geared towards helping you achieve that vision. It should be punchy, inspiring and clear.

Values

Your values are part of how you'll go about delivering your vision. They don't describe what you'll be doing, but rather talk to how you'll behave along the way. Values will help guide you in making the right decisions for key elements of your strategy.

Focus Areas

Focus areas describe the high-level things that you will focus on to deliver your vision. Each one should be specific and clear. You should be confident that by the time you've delivered against all of your focus areas, you stand a good chance of having delivered against your vision.

Objectives

Your objectives are your high-level goals and sit directly underneath your focus areas. Each focus area should have 3 - 4 objectives which describe the key goals of that focus area.

Projects

Projects are the specific things you will do to help reach your objectives. They are clearly defined with a start point and an end point.

KPIs

KPIs are how you measure whether or not you are achieving your objectives. They should contain specific metrics and targets.



What Is A Strategic Plan

For larger organizations, you may need to repeat the above structure for each department. That's absolutely fine, but you need to ensure that the objectives of the department below, align directly to the objectives of the department above. I.e. the objectives of the 'Recruitment' department should align clearly to the objectives of the 'Human Resources' department. And the objectives of the 'Human Resources' department should align clearly to the objectives of the overall 'Corporate Plan'.

There's one more element that we haven't yet discussed - the role of your *strategic framework*.

We'll cover this in more detail later on, but your strategic framework will essentially be a way of categorizing the goals of your organization into a meaningful way to enable better reporting.



Common Planning Mistakes

Before we get into the actual planning, let's take a quick look at some of the most common mistakes people make in strategic planning. We've written tons of content on each of these aspects, and those guides are linked below:

1

Failing to get proper buy-in / engagement

This is by far the biggest killer of strategic plans. People spend a huge amount of effort on the plan itself, but then forget about the fact that to execute, they're going to need the buy-in of the entire organization. [\[Read More\]](#)

2

Making things too complex

How often have you seen a plan so complex it requires its own diagram to explain the different elements? Keep your plan structure and content simple, so that literally anyone can understand it. [\[Read More\]](#)

3

Not telling a good story

A good strategy is like a good story. It has a beginning, a middle and an end. It needs to be inspiring, fun and meaningful. Turning your strategy into a story makes it easier to communicate and to gain the buy-in you need for success. [\[Read More\]](#)

4

Being unrealistic

Yes, it's a bit of a buzz-kill - but you need to ensure that your strategy is plausible and realistic. Otherwise you risk losing faith from your people and the credibility of the strategy will hurt forever. [\[Read More\]](#)



Vision Statement

Remember, your vision statement is the absolute pinnacle of your strategic plan. You need to get this right before you move onto fleshing out the main parts of your strategy.

Before you get started, you might also want to check out our free eBook: [100 of the World's Best Vision Statements](#)

OK, without delay, let's get into the process you need to follow for creating your vision statement from scratch:

Step 1: Define what you do as an output

Start by being exceptionally clear about what it is your organization actually does. Be careful to remain 'output focused' rather than 'input focused'.

For example, Microsoft famously had a vision statement to:

"Put a Microsoft powered computer on every desk in the world".

Strictly speaking what Microsoft 'do' is make software, but for the purposes of their vision, they looked forward to the actual outcome of this process – i.e. computers on desks.

A bakery makes bread. But the *outcome* is consumers enjoying that bread.

A consulting company gives advice. But the *outcome* is the success of others based on that advice.

A government department does...lots of things. But the *outcome* is better lives for the citizens they serve.



Vision Statement

Whilst this process may seem obvious – you would be surprised by how rarely organizations actually go through this in a formal, written way.

Try it for yourself for your organization:

The outcome of my organization succeeding is:



Vision Statement

Step 2: The unique twist your organization brings to this outcome

Very few products or services these days are truly new – most are more like reinventions of something that exists already, but with a different approach, focus or spin.

At some point in your organization's lifespan – someone believed that the reason that this organization would be successful where others have failed, was because of ... something.

You need to define that something!

Let's take our bakery example. So far, our vision statement is looking pretty generic, along the lines of customers enjoying our bread. But why will they enjoy our bread MORE than the bread from the place next door?

Is it because we use centuries-old traditions passed through generations of our family?
Because we only use premium grade locally sourced ingredients?

Whatever your unique selling point is – let it shine through in your vision statement. Write a sentence in the box below as follows:

We will succeed where others have failed because:



Vision Statement

Step 3: Apply some high-level quantification

A common problem with not-so-good vision statements is ironically, that they're often too visionary! With no possible end in sight (or a totally unrealistic one) – the initial inspiration derived from a good vision statement can quickly turn to frustration or even cynicism among employees and customers.

That said – don't be too specific or apply specific metrics at this stage (they will come later in our planning process). Sticking with our bakery example – we might want to refine our target audience to 'every customer who walks through the door' – that's fine, or maybe we want to be bolder: 'every customer within walking distance of a store'.

The quantification we apply could also be industry specific if you're a B2B – are you shooting for SMEs or multinationals for example?

Write down a sentence as follows:

Our organization primarily serves:



Vision Statement

Step 4: Add relatable, human, 'real world' aspects

A final trick you can apply to make your vision statement memorable is to add a real-life aspect. This allows people to conjure up a mental image associated with your vision statement.

Let's look at an example – which of the following statements is likely to be more memorable:

- a) To have every working person in the world using Microsoft product
- b) A Microsoft powered computer on every desk.

Arguably (b) is more memorable because as we read it, we actually visualize a computer sitting on a wooden desk in a room.

There's nothing wrong with (a) but it's highly conceptual and thus difficult to transform into a mental picture. Let's look at another example:

"Ensure that every customer who leaves our store, does so smiling."

Here, using the word 'smiling' as opposed to 'happy' is powerful, because it conjures a mental image of a person smiling. It won't always be possible to bring this level of tangibility to a good vision statement – but if it is, do so. Try the following exercise:

When people/companies use our product/service – they should feel:



Vision Statement

Ok, so you've written down a bunch of sentences from the steps above. Now it's time to bring them all together into a cohesive vision statement. To make things easier, we've recapped how we would have answered each question for our own imaginary bakery scenario:

The outcome of my organization succeeding is that:

People will enjoy some incredible bread.

We will succeed where others have failed because:

Our bread is made with locally sourced ingredients of the highest quality.

We primarily serve:

The local community who physically walk into our stores.

When people use our product, they should feel:

Unexpectedly happy.

OK, so how might that all look in a vision statement. How about the following:

Producing and selling locally sourced cakes and pies that are so delicious and satisfying, that every customer who leaves our store does so with a smile.

The cool thing about this vision statement is that it incorporates all of our steps (no less than 4!) but in a way that is simple, easy to read and memorable.

Let's deconstruct those elements so we can understand how we did it!



Vision Statement

Here's the vision statement again, this time with the key elements highlighted in color:

Producing and selling **locally sourced** cakes and pies that are so **delicious and satisfying**, that **every customer who leaves our store** does so **with a smile**.

Let's take a look at those elements:

Step 1 - The outcome: "delicious and satisfying"

Step 2 - The twist: "locally sourced"

Step 3 - The quantification: "every customer who leaves our store"

Step 4 - The human connection: "with a smile"

OK, now it's time to take the sentences you've written down and put them all together into a vision statement like the one-above. You'll probably need to play around with the wording a few times to get it just right, but it shouldn't be too difficult now that you have each of the elements properly identified.

Our vision is to:



Values

OK, so we have our vision statement all done and dusted. Now it's time to move onto the next part of our plan - our values.

Values are a surprisingly important part of your strategy. They guide *how* you want your people to behave as they go about executing your plan.

You'll often find yourself referring back to your values as new opportunities arise for your business in the future. Think of them as a guiding light for helping you make decisions. This is the difference between creating values intended for your own people, vs values aimed at your customers or other stakeholders.

We're going to go out-on-a-limb here and say that in our own experiences, internal values are almost always more powerful for helping you to execute your plan, than external ones. This guide will focus on creating internal values rather than external values. External values (ie ones that form part of your marketing strategy) are prone to being gimmicky and marketing oriented.

Before you get started you might want to check out the following resource: [130+ Awesome Company Values](#).

Step 1: Start with your people

Well written values aren't planned – they're reflections on the things about your organization that are already great. They already exist – so this process is not so much about creating new values, but extracting the ones that you already have and that you want to solidify and amplify.

Begin by identifying the people in your organization who you trust and value the most. The people who are truly invaluable to your operation. Ideally, the people who've been there long enough for you to know them as people, not just as colleagues.



Values

Start writing down what's so great about them. List out everything – whether it's their coding skills, their work ethic, their intellect, anything. Go person by person, and write it all out into a giant list.

Cross out anything in the list that is either (a) a technical skill, (b) related to knowledge / experience or (c) related to intellect / intelligence. Why? Because whilst important, none of these things relate to human values.

You'll probably find that your list is pretty small by now. Think carefully now about the people who didn't make it with your organization (people who were fired or have left). Did they have all or most of the values on your list? Probably not!

OK so that's all easy in theory, but here's how the exercise actually looked when we did it here at Cascade:

Tom	Eric	Jane	Meina	Dan
Ambitious	Intelligent	Open Minded	Helpful	Intelligent
Passionate	Passionate	Curious	Intelligent	Passionate
Curious	Fun	Passionate	Honest	Honest
Helpful	Creative	Empathetic	Curious	Curious
Writing	Honest	Intelligent	Passionate	Hard Working
Determined	Curious	Honest	Hard Working	Dilligent
	Hard Working	Creative	Coding	

You can easily see the shared values that came through when we did this. Some of the things like 'intelligent' we crossed out, but what was left behind gave us a clear starting point for what our organizational values should be.



Values

Have a go at the same exercise for your own organization:

- What themes can you pick out from the process?
- Are these the same things you look for in new hires?
- Don't forget to cross out anything that relates to hard skills, personality or intelligence!

Step 2: Translate into business values

From the process above, you'll have a list of personal values. This is a great starting point, but you'll want to make sure that they make sense in a business capacity. You can do this by applying two tests to each of the values:

Why do we believe in this?

How would we bring this to life across the organization?



Values

Here's an example:

Value:

Passion

Why do we believe in this?

We're a small but growing organization. The strongest trait that our organization needs to achieve success is self-motivated people. Arguably the two most important drivers of this are 1) a passion for what you do and 2) the ability to genuinely enjoy your work and embrace it as a positive aspect of your life.

How would we bring this to life across the organization?

We would encourage and fully allow people to discover and work with the tools and technologies they want to learn. Empower them to implement the processes or techniques they wish to try, and research new ways of doing things. We allow them to change their minds and we never rebuke 'failure'.

If you're able to answer both of these questions about the value, it's a great candidate for your final set of organizational values.

Over the next few pages, add in the values you came up with as part of step 1, then follow the framework above to flesh them out.



Values

Value 1:

We believe in this because:

We will bring this to life in our organization by:

Value 2:

We believe in this because:

We will bring this to life in our organization by:

Value 3:

We believe in this because:

We will bring this to life in our organization by:



Strategic Focus Areas

Step 1: Identify strengths & weaknesses

Focus areas are arguably the first level of your strategic plan that starts to get specific. Whilst your vision statement will guide where you want to ultimately end up – your focus areas represent the things you're going to be working on to get there.

Focus areas go by many different names depending on what strategic planning methodology you're using. Focus areas are also sometimes called Strategic Pillars.

Start by identifying your strengths and weaknesses

Just because you're not good at something, doesn't mean you shouldn't get good at it. But at the same time, creating a set of focus areas that you can't realistically deliver against is a sure fire way to set yourself up for failure. Shortly, we'll be creating our ideal set of focus areas irrespective of these strengths and weaknesses – but for now, it's a good idea to think realistically about what your organization is really good at and what it isn't.

Create two lists, and for each strength or weakness that you identify, write down a 'point of proof' from the last 12 months. For example:

Our Strength: *We create genuinely innovative products*

Proof Point: *Customers regularly comment on our unique product features as part of our NPS surveys*

Our Weakness: *We struggle to communicate effectively as a team sometimes*

Proof Point: *Our US office sells the benefits of Cascade entirely differently from our sales team in Australia*

Over the next couple of pages, do this for your own organization.



Strategic Focus Areas

Strength 1:

As proven by:

Strength 2:

As proven by:

Strength 3:

As proven by:



Strategic Focus Areas

Weakness 1:

As proven by:

Weakness 2:

As proven by:

Weakness 3:

As proven by:



Strategic Focus Areas

Step 2: Identify your ideal focus areas

Now, completely discard everything you've done above!

Write a sentence that references the things that in an ideal world, would take you to delivering your vision statement.

By focusing on innovative food products, an exceptional in-store experience and value for money - we should be able to achieve our vision.

From this sentence, we can extrapolate our ideal focus areas as being:

- Innovative Products
- Exceptional In-Store Experience
- Value for Money

This exercise is best done with your team - and whilst you might feel silly, we've found the best way to do this is to sit around a table, and literally take turns to say the sentence above as it relates to your business.

Each time someone says something (even one element) that sounds good, write it down and at the end, combine the best examples that people gave into your final sentence.

Struggling to come up with solid focus areas for your own business? Don't worry, over the page we've got some examples to get you started...



Strategic Focus Areas

Here are a few examples of focus areas to get you started:

Expansion / Growth – e.g. *Expand network to the Asia Pacific*

Revenue / Cost / Margin – e.g. *Increase sales*

Customer Satisfaction – e.g. *Repeat business from customers*

Compliance – e.g. *Zero regulatory issues*

Innovation – e.g. *Launch new product lines*

Engagement with a Stakeholder Group – e.g. *Engage with our community*

Employee Happiness – e.g. *Proud & Happy Staff*

The examples above are necessarily generic - so don't use them verbatim for your own business. Adapt them to be more specific and focused on achieving your vision.



Strategic Focus Areas

Focus Area 1:

Focus Area 2:

Focus Area 3:



Strategic Focus Areas

Step 3: Reflect on your focus areas vs your strengths & weaknesses

Your 'ideal' focus areas should absolutely be the starting point for your eventual set. But now is the time to take a step back and ask yourself whether your focus areas align well to your strengths and weaknesses.

A good formula to apply is that roughly 2/3 (two thirds) of your focus areas should amplify your strengths. This means that for the most part, you're playing to your strengths not your weaknesses.

That leaves 1/3 (one third) of your focus areas which don't have to match to one of your strengths. In our example above, we stated that a weakness was our historic inability to co-ordinate communication efforts between offices. This could be a problem for our 'Rapid Expansion' focus area. That doesn't mean we shouldn't do it, but rather we need to keep this in mind as create our Objectives in the next phase of creating our strategic plan.

Revisit the focus areas you created on the page prior and ensure they meet the above formula. If they don't, reconsider until they do.



Choosing A Strategic Framework

Before we start creating goals for our plan, there's a crucial decision that we need to make:

Are we going to use a strategic framework?

A strategic framework is essentially a way of categorizing our goals into different groups. The groups will vary depending on the framework we decide to use. Different frameworks help you achieve different things, so the one you choose will vary depending on what you want to achieve for your organization.

Rather than go into the details of all the frameworks available, we would suggest reading our comprehensive guide to strategy frameworks - [available here](#). As a quick summary, here are some of the most popular frameworks and why you might use them:

The Balanced Scorecard - *Great for larger organizations who want to ensure their goals cover the main aspects of a successful business.* [\[Read More\]](#)

The Ansoff Matrix - *Great for organizations who are about to embark on an aggressive growth strategy and need help defining their plan of attack.* [\[Read More\]](#)

McKinsey's Strategic Horizons - *Great for organizations who have decided that innovation is a crucial part of their strategy.* [\[Read More\]](#)

Value Disciplines - *Great for organizations who are looking to fundamentally reposition themselves in their marketplace.* [\[Read More\]](#)

The Stakeholder Model - *Great for organizations where stakeholders are the core of what they do, such as non-profits.* [\[Read More\]](#)

Once you've selected a framework, make sure that you learn how to use it (the links above will help with that) then apply it to the next stage of this process - goal setting.



Goal Setting

'Goals' is actually a collective term, and can refer to several specific things within your plan. The term 'goals' incorporates:

- Strategic objectives
- Projects
- KPIs
- Lots more...

In essence anything in your plan that has a clearly stated outcome, ideally with a start and end date can be considered a 'goal'.

In this guide, we're going to show you how to create a single strategic objective, along with some projects and KPIs to complete it.

There are no specific rules for how many goals you should have in your plan, but as a starting point, try to aim for:



So if you had 3 focus areas, you would end up with a total of 9 strategic objectives (3x3), 18 projects (9x2) and 18 KPIs (9x2).

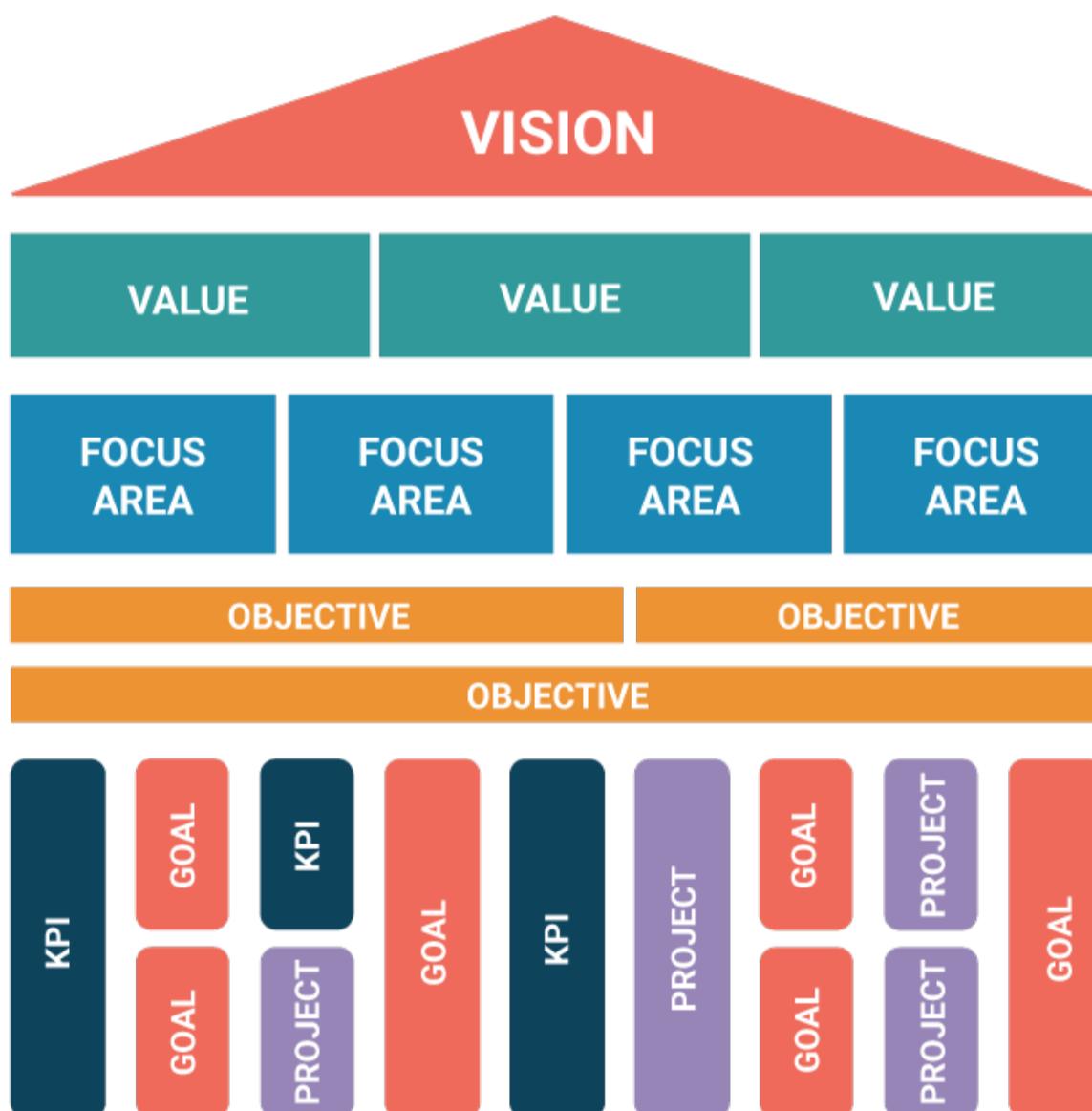
That's a lot of goals, which is why we suggest trying to restrict yourself to 3 focus areas, as otherwise your plan can quickly become unmanageable and even unrealistic.



Goal Setting

Step 1: Creating strategic objectives

Strategic objectives sit within each of your focus areas. Here's a quick reminder of the diagram from earlier in the toolkit to jog your memory:



Objectives can either sit entirely within a focus area, or can span across multiple focus areas. They differ from focus areas in that they're specific and measurable, and once completed will be replaced by a different goal. They can be tangibly achieved.

The way we like to think of objectives is:

If you were meeting with your investors / board – what would be the key programs / goals that you would update them on if you only had an hour.



Goal Setting

Too few and you're probably not stretching yourself. Too many and you're unlikely to achieve them all. As a rule of thumb – if we tie strategic objectives into our bigger framework – we would probably suggest having between 2 and 4, per each of your focus areas.

The main advice here when writing strategic objectives is to keep things simple. They should be easy to remember and should be understandable by everyone within the organization. That means no jargon (if possible), and keeping them to one sentence long. You can add more detail of course, but you should be able to sum up what you want to achieve quickly and simply.

We've also created an [article with examples of good strategic objectives](#), which should help give you an idea of what they should look like while getting started

Remember, strategic objectives are not about defining KPIs (that comes later) - but they are about setting aspirations. Here's an example of a strategic objective for our bakery:

To become well-known as the best breakfast spot in our local neighborhood

For reference, this objective sits within our focus area of 'Exceptional In-Store Experience'. As you can see, the objective is aspirational and somewhat measurable - but not too specific. It's also memorable and something that everyone in the organization can easily get behind as a goal.



Goal Setting

Step 2: Add projects to your objective

Without tangible actions, our strategic objective will never actually happen. So now it's time to state exactly what we're going to do to become the best breakfast place in the suburb. Here's a couple of ideas we could use:

- Revamp our decor in-line with our new brand / image
- Implement an electronic queue system to enhance the 'waiting for your table' experience

You'll want to ensure that your projects are properly assigned to individuals and that they have clear end-dates for completion.

Step 3: Add KPIs to measure progress against your objective

Now that we have some projects to bring our objective to life, we also need to ensure we can measure whether or not those projects are actually helping us to achieve our strategic objective. The best way to think about KPIs is by turning your objectives into a sentence as follows:

*Our **objective** is to become well-known as 'the best place for breakfast' in our suburb. As **measured** by: (a) at least 5 positive Google Reviews per week and (b) at least one mention in the local press per quarter.*

(a) and (b) are our KPIs - and by structuring them in this sentence-style - it ensures that they relate directly to our objective.

If you're struggling to come up with KPIs for your objectives, you might want to check out the mini-series we wrote on [creating KPIs for most of the common business functions](#) for some inspiration.



Goal Setting

Now it's time to try this out for yourself! Start by selecting one of your focus areas, then create an objective, projects and KPIs using the template below:

	Focus Area:	
	My objective is to:	
	Which I will deliver by:	
(a)		
(b)		
	As measured by:	
(a)		
(b)		

Even if you don't feel 100% happy with your outcome, don't worry - strategic planning is an iterative process and you're expected to make changes along the way. Keep going until you have objectives for all of your focus areas.



Next Steps

Everything so far that we've covered can be accomplished with little more than this toolkit and a pen and paper. But as your plan gets bigger and more complex, you'll likely want to find a more dynamic and flexible place to house your strategy than paper (or even Excel).

This is where cloud-based strategy platforms like [Cascade](#) really come into their own. Cascade allows you to:

- Drag and drop together the different building blocks of your strategy
- Keep items in draft as you edit them
- See the linkages between different levels of your plan
- Share your strategic plan with others through exports or even team-based access
- Add color, pictures and even videos to your strategy to really bring it to life

Even more importantly, Cascade gives you a seamless bridge between your strategic plan and the actual execution of that plan, and includes a full suite of execution tools, report builders, ready-made strategic dashboards and much more.

We have an awesome [free trial](#) available that you can start instantly with no credit card and gives you unlimited access to all our features. Even better still, you'll get access to our fantastic team of strategy experts who can tweak your plan with you and help ensure you're setup for success.

Rated 5/5 on [capterra.com](#):



Rated 4.7/5 on [g2crowd.com](#):

