Strategic Planning Template

A one-page-at-a-time roadmap: who you are, where you stand, where you're going, and who will do what this year. Complete it with your leadership team and revisit it every quarter.

WHO WE ARE

Mission (why we exist)

Vision (what success looks like in 3 to 5 years)

Core values

WHERE WE STAND TODAY

Strengths	Weaknesses

Opportunities	Threats

PRIORITIES FOR THE NEXT 12 MONTHS (3 TO 5)

Priority	How we'll measure success	Owner	Deadline	Resources needed

QUARTERLY CHECK-INS

Quarter	Date	On track?	What we'll change
Q1			
Q2			
Q3			
Q4			

IAG facilitates planning sessions and leadership retreats for small organizations. **Talk with an advisor: integrityadvisorygroup.org/contact**

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