



# *Strategic Planning*

One-Page Sample Plan and Template

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## Welcome Strategy Leader!

To help you get started off on the right foot, we've created this One-Page Sample Plan and Template to help you see what a complete strategic plan looks like.

### **This download includes:**

Common Strategic Planning Definitions

Sample One-Page Plan

One-Page Plan Template

Access to 80 Sample Strategic Plans



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# Strategic Planning Definitions

## Strategic Issues

**What are we trying to fix, accomplish or avoid as a result of this process & plan?**

**Strategic issues** are critical unknowns that are driving you to embark on a strategic planning process now. These issues can be problems, opportunities, market shifts or anything else that is keeping you awake at night and begging for a solution or decision.

## SWOT

**What are our strengths, weaknesses, opportunities & threats?**

A **SWOT analysis** is a quick way of examining your organization by looking at the internal strengths and weaknesses in relation to the external opportunities and threats.

## Mission Statement

**What is our purpose? Why do we exist? What do we do?**

The **Mission Statement** describes an organization's purpose or reason for existing.

## Vision Statement

**Where are we going?**

A **Vision Statement** defines your desired future state and provides direction for where we are going as an organization.

## Values Statement

**How will we behave?**

Your **Values Statement** clarifies what your organization stands for, believes in, and the behaviors you expect to see as a result.

## Competitive Advantages

**What are we best at?**

A characteristic(s) of an organization that allows it to meet their customer's need(s) better than their competition can. What are we best at in our market?

## Organization-Wide Strategies

**How will we succeed?**

Your strategies are the general methods you intend to use to reach your vision. No matter what the level, a strategy answers the question "how."

## Strategic Objectives

**What must we focus on to achieve our vision? What are the "big rocks"?**

Long-term, broad, continuous statements that holistically address all areas of your organization including financial, customer, internal/operational, and people/learning.

## Corporate Goals

**What is most important right now to reach our long-term strategic objectives?**

Annual statements that are specific, measurable, attainable, realistic and time bound (SMART). These are outcome statements expressing a result expected in the organization.

## Department Goals and Action Items

**Who must do what by when?**

Functional goals/action items support the accomplishment of the annual objectives and align with individual performance plans.

## Key Performance Indicators

**How will we measure success?**

**Key Performance Indicators** (KPI) are the key goals that you want to measure that will have the most impact in moving your organization forward. We recommend you guide your organization with measures that matter.

# Sample One-Page Plan

## STRATEGIC PLAN

### Downtown Family Dental Care Strategic Plan 2015-2018

#### FOUNDATION

##### Our Mission - Why do we exist?

Our mission is to deliver timely, affordable and top-notch dental services for our patients, resulting in a healthier local community.

##### Our Core Values: How will we behave?

- Preventative Health** - our foundation is built on passion for proactive oral care through preventative dental services.
- Patient Focus** - a razor-sharp focus on our patients' experience, resulting in positive outcomes for all.
- Integrity** - to have honesty and respect for all individuals.
- Respect & Comradery** - to maintain a positive, team-focused office atmosphere built on mutual, professional respect.
- Learning Excellence** - to continually pursue knowledge and uphold the highest caliber of dental expertise.
- Community Health** - to effectively impact oral health locally and globally.
- Fun** - to have enjoyment and fulfillment in our work.

#### COMPETITIVE ADVANTAGE & STRAT.

##### How will we win?

- We excel at build lasting, trusting relationships with our clients through high-touch relationships and premium patient service.
- We are industry leaders in leveraging & aligning innovative technologies with office process to more effectively manage patients and our staff.
- We invest heavily in ongoing professional development for the staff for sustained industry-leading practices.

##### How will we play?

To grow the practice one patient at a time to achieve 400 patients by 2017 through unmatched patient service, which we will accomplish by offering trusted, affordable and personal dental services in order to support preventative oral care in our local community.

#### STRATEGIC PRIORITIES (3 YEAR), COMPANY GOALS (1 YEAR), ACTIONS (90 DAYS)

##### Financial Results

Strategic Priorities	2015 Goals	Actions
<b>1 Profitability Improvement:</b> Maintain a 35% Net Profit Margin each year.	<b>1.1 Re-Investment:</b> Maintain profitability with a budget allocation of 20% for business re-investment. <b>1.2 Revenue:</b> Increase average revenue earned per clinician hour worked to \$400/hr.	

##### Customer Success

Strategic Priorities	2015 Goals	Actions
<b>2 Patient Retention:</b> To build long-term, loyal relationships with our clients.	<b>2.1 Existing Clients:</b> Improve patient retention by 12% year-over-year to achieve 76% patient retention by EOY 2015. <b>2.2 Patient Satisfaction:</b> Achieve a 90% client satisfaction score on our annual Satisfaction Survey in 2015.	

##### Operational Excellence

Strategic Priorities	2015 Goals	Actions
<b>3 Clinical Technology:</b> Continue to simplify and streamline processes through the usage of new technologies.	<b>3.1 Charts:</b> Convert all patient charts to digital chart program by EOY 2015. <b>3.2 Scheduling:</b> Implement a new scheduling software to allows clinicians, hygienists & office staff remote access to an up-to-date office schedule.	
<b>4 Marketing:</b> Make our name known within the local community.	<b>4.1 Social Media Marketing:</b> Establish an online social media presence and strategy to build an organic online following. <b>4.2 Website:</b> Update the look and functionality of our website, adding a direct contact form, staff biography page, and a variety of client testimonials.	

##### People Expertise

Strategic Priorities	2015 Goals	Actions
<b>5 Our Team:</b> Actively help our team to develop and grow professionally and personally by supporting a flexible work life, providing intellectually engaging work, and fair compensation.	<b>5.1 Training:</b> Formalize an onboarding process for new hires for a quick and effective integration into the office. <b>5.2 Professional Development:</b> Achieve timely completion of education requirements by requiring each hygienist complete a minimum of 8 contact hours each year to meet the 24 required hours per three-year registration period. <b>5.3 Leadership Development:</b> Have each dentist & specialist attend at least one dental conference each year.	

#### KEY PERFORMANCE INDICATORS

##### How we measure success?

Measure	Target
Average revenue per month	\$70,000
Average revenue per clinician hour worked	\$400
Average number of new patients per month	3
Average operating costs per month	\$45,000

#### VISION

##### Where are we going?

We envision being the leading dental practice, improving our communities' health and well-being – one patient at a time.

#### IMPLEMENTATION

##### How will we hold ourselves accountable?

- Appoint a Strategic Plan Leader.
- Hold Quarterly Strategy Review Meetings.
- Post Strategic Plan in the office for a continual reminder.
- Align performance management & compensation/bonus structure with the Strategic Plan.
- Host an annual planning retreat in January of each year.



**Downtown Family Dental Care**

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# One-Page Plan Template

## STRATEGIC PLAN

### FOUNDATION

Our Mission - Why do we exist?

Our Core Values: How will we behave?

### COMPETITIVE ADVANTAGE & STRAT.

How will we win?

How will we play?

### STRATEGIC PRIORITIES (3 YEAR), COMPANY GOALS (1 YEAR), ACTIONS (90 DAYS)

Financial Results

Strategic Priorities

2019 Goals

Customer Success

Strategic Priorities

2019 Goals

Internal/Operational Excellence

Strategic Priorities

2019 Goals

People Expertise

Strategic Priorities

2019 Goals

### KEY PERFORMANCE INDICATORS

How we measure success?

### VISION

Where are we going?

### IMPLEMENTATION

How will we hold ourselves accountable?

## Free Strategic Plan Examples

Simply click to download any of these publicly available strategic plans. For-profit plans aren't made publicly available for securities and confidentiality reasons.

### Education

- Washoe County School District
- Appalachian University
- Bowling Green State University
- Colorado State University
- Duke University
- Iowa State University
- Texas Tech
- University of Illinois
- Washington State

### Hospitals

- Childrens Hospital Seattle
- Credit Valley Hospital
- Hartford Hospital Nursing Plan
- Hospital Mission, Vision, Values Examples
- Ontario Hospital Association
- Royal Children's Hospital, Melbourne
- Royal Perth Hospital
- West Hawaii Region Hospitals

### Medical Associations

- Alabama Health Exchange
- Alzheimers Association
- American Academy of Neurology
- ASMA
- Hampton Roads Multiple Sclerosis Society

### Churches

- Brighton Heights Reformed Church
- Channing Memorial Church
- Church of our Savior
- Hillcrest Covenant Church
- South Congregational Church
- Southern Baptist Church
- Saint John the Forerunner Church
- St. Matthews Church

### Food Banks

- Freestore Food Banks
- Manna Food Bank
- Oregon Food Bank
- Rhode Island Food Bank

### Tribal Plans

- EPA OPPTS Tribal Plan
- EPA Pacific Northwest
- Infrastructure Development
- National Center for Health
- Native Village of Afognak
- New Mexico State Tribal Plan
- Northwest Area Foundation
- Northwest Area Foundation Summary
- Tulalip Reservation
- USDA Civil Rights
- Washington State Governor's Office of Indian Affairs
- Yukon River

### Cities

- Albany, Oregon
- Bloomington, Indiana
- Dallas, Texas
- Gainesville, Florida
- Las Vegas, Nevada
- Reno, Nevada
- Reno Tahoe
- Vancouver, Washington
- Victoria, Canada

### County

- Dallas County, Texas
- Maricopa County, Arizona
- Mecklenburg County
- Miami-Dade County, Florida
- Pima County, Arizona
- Prince Edward County, Virginia
- Prince George County, Virginia
- Prince William County, Virginia

### National

- Department of Homeland Security
- NASA
- State Energy Program
- US Department of State

### Parks and Recreation

- Alaska Parks and Recreation
- Seattle Parks Department

### Police Departments

- Davis Police
- Division of Police
- Hayward Police
- New Zealand Police
- Philomath Police
- Plano Police
- South Lake Tahoe Police
- Vancouver Police

### State Tourism

- Hawaii Tourism
- Lewis and Clark Tourism
- Michigan Tourism

### Veterans Affairs

- Department of Veterans Affairs
- Washington State Department of Veterans Affairs