

STRATEGIC PLANNING WORKSHEET

Strategic planning involves developing the practice's mission, vision, core values and business strategy. It also includes a SWOT Analysis and defining short & long-term practice goals.

Mission

The mission refers to your daily purpose. It encompasses who you serve, what need you satisfy and how you are serving these needs. A mission statement is often used in marketing collateral and doesn't change frequently. What is the primary mission of the business? Brainstorm aspects of your purpose and then draft a one to two sentence statement.

Vision

The vision statement is an inspiring, motivating statement that refers to your long-term aspirations and goals. Think of creating a picture for the entire team-what you want to anchor them to. Your vision may be a lofty expression of your goal or simple statement about what the business wants to achieve. What are medium to long-term goals of the owners/organization? What is your most lofty goal? Brainstorm key points of your vision and then draft a one to two sentence statement.

Goals

What are your primary goals or objectives? (Consider both short and long-term goals)

Core values

Core values are guiding standards, beliefs, commitments, or principles. They reference "how" you will do business and speak to your practice culture. What core values represent what is most important to you, your employees, and your clients? What core values drive how you will act and how you want everyone in the practice to act?



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SWOT analysis

INTERNAL ASSESSMENT

Strengths: What does your practice do really well? What about your practice helps you to be successful?

Weaknesses: What does your practice have difficulty with? What are areas needing improvement?

EXTERNAL ASSESSMENT

Opportunities: What could you do that would improve your competitive position in the marketplace?
What could you do to turn your weaknesses into opportunities?

Threats: What could threaten your success?

