



#GOALS



# Strategic Planning

Inspired by the Rockefeller Principles

*We hope you enjoy this sneak peek at our leadership development curriculum, The Re-Imagined Leader Series. We've included some helpful worksheets to print off as you form new goals and initiatives for your company this year.*

*Want to learn more about carrying out your goals with effective meetings and how to execute them efficiently together? Visit our website:*



*[prophit.com/re-imagined\\_leader/](http://prophit.com/re-imagined_leader/)*

Strategic planning is the process of documenting and establishing a direction of your business by assessing both where you are and where you're going. It's a place to record your mission, vision, values, long-term goals and the action plans you'll use to reach them. A well-written strategic plan can play a pivotal role in your business' growth and success because it tells you and your employees how best to respond to opportunities and challenges. <sup>2</sup>

## **Goal**

A goal so big, it makes you scratch your head.

## **Initiative**

A major area of focus to achieve the goal.

## **Priority (90-day Plan)**

A short-term plan in achieving the initiative.

## **Action**

A piece of the short-term plan.

## **Owners**

The individual(s) who is/are ultimately responsible for the goal, initiative and priorities.

## **Meeting Rhythms**

A set schedule of focused meetings.

## **Our Purpose**

Why you exist, what you are called to do and how you live your beliefs.

<sup>2</sup> The Hartford, An Introduction to Strategic Planning, 2018

# Goal Setting

## Goal

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## Signatures

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## Key Initiatives at a Glance

### Initiative 1

Completion Date: \_\_\_\_\_

Focus:

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Initiative 1 Owner: \_\_\_\_\_

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Input Team Member(s): \_\_\_\_\_

### Initiative 2

Completion Date: \_\_\_\_\_

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Initiative 2 Owner: \_\_\_\_\_

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### Initiative 3

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Initiative 3 Owner: \_\_\_\_\_

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### Initiative 4

Completion Date: \_\_\_\_\_

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Initiative 4 Owner: \_\_\_\_\_

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### Initiative 5

Completion Date: \_\_\_\_\_

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Initiative 5 Owner: \_\_\_\_\_

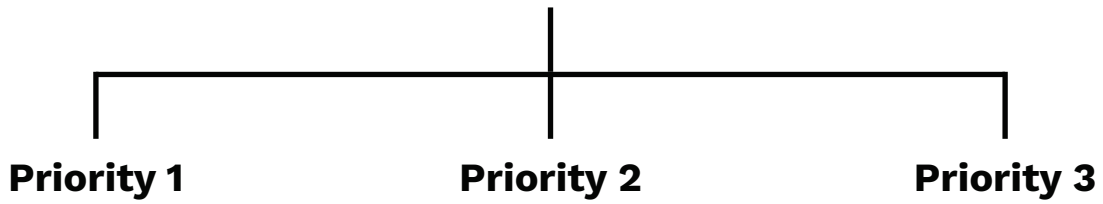
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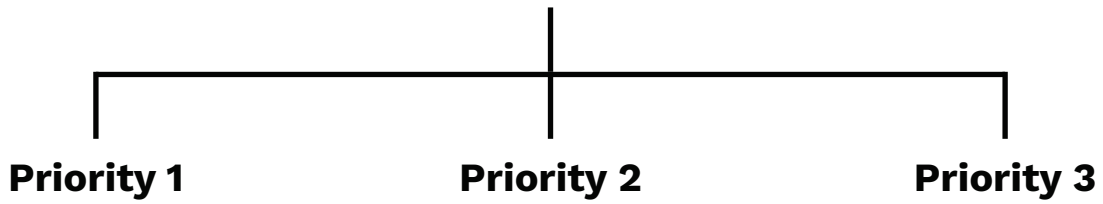
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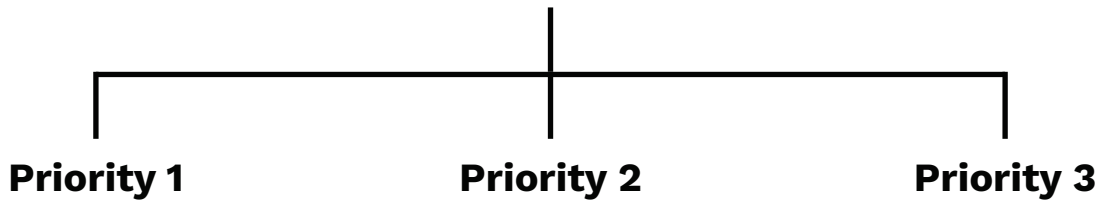
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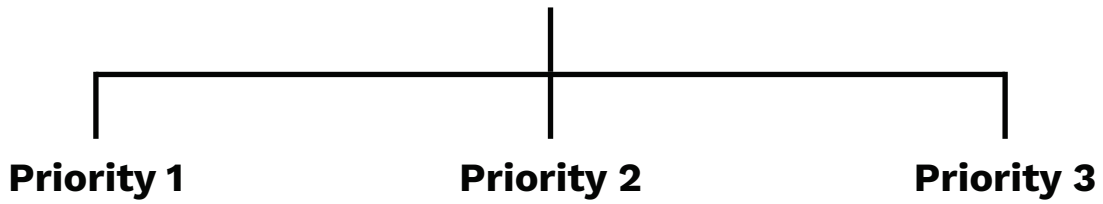
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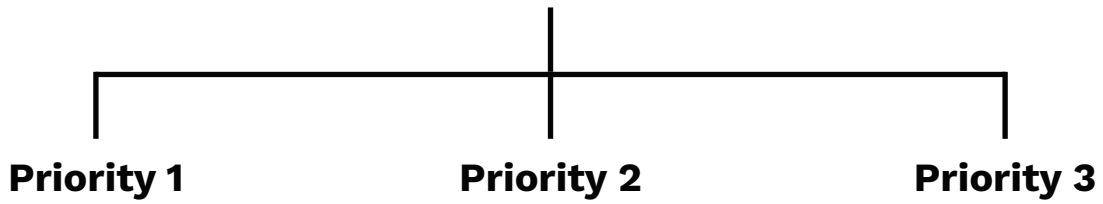
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