

Strategic Planning Template

Strategic Plan for _____

Year _____

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1. Executive Summary

1.1. *Preferred Option*

1.2. *Alternatively*

2.3. Macro or External Environment

[\(For further reading, see our Macro Environmental Analysis how to guide\)](#)

Using PESTLE

- Political
- Economic
- Social/cultural
- Technological
- Legal
- Environmental (Environmental issues, global warming, pollution etcetera)

And adding “International”

Environmental factor	Comments
Political/ Legal	The legal and government systems within which an organisation functions
Economic	Are there any local, national, regional or global technology changes that may impact you or your customers
Socio-cultural	The attitudes, values, norms, beliefs, behaviours and associated demographic trends characteristic of a given geographic area
Technological	Are there any technology changes that will affect your business?
Environmental	Are there any technology changes that will affect your business?
International	The developments outside an organisations home country, with the potential to impact the organisation

Summary of SWOT for Macro Environment Analysis

Opportunities	Threats

2.4. Industry Environment - Porters Five Forces

Learn how to, some useful Porters Five Forces Links

- [Porters five forces overview](#)
 - o [Industry rivalry](#)
 - o [The bargaining power of suppliers](#)
 - o [The bargaining power of customers](#)
 - o [The threat of new entrants](#)
 - o [The threat of substitute products](#)

Industry Rivalry	Comment on the extent of competition between competitors	Rating
Industry growth rates		
High fixed costs		
Intermittent over capacity		
Product differences		
Brand identity		
Switching costs		
Informational complexity		
Concentration & balance		
Diversity of competitors		
Corporate stakes		
Exit barriers		
Industry rivalry overall rating		

The bargaining power of customers (buyers)	Comment on the degree of customer power in your industry	Rating
Differentiation of outputs		
Switching costs		
Presence of substitutes		
Industry concentration relative to buyer concentration		
Importance of volume to buyers		
Cost relative to total buyer purchases		
Impact of outputs on the cost of differentiation		
Buyer information about supplier products		
Buyer profitability		
Decision makers incentives		
Threat of backward integration		
Bargaining power of customers (buyers) overall rating		

The bargaining power of suppliers	Comment on the degree of supplier power	Rating
Differentiation of inputs		
Switching costs		
Presence of substitute products		
Supplier concentration relative to industry concentration		
Importance of volume to suppliers		
Cost relative to total purchases in the industry		
Impact of inputs on cost or differentiation		
Information about suppliers products		
Supplier profitability		
Decision makers incentives		
Threat of forward integration		
Bargaining power of suppliers overall rating		

The threat of new entrants	Comment on the ease of entry to your industry	Rating
Economies of scale		
Proprietary product differences		
Brand identity		
Switching costs		
Capital requirements		

Access to distribution		
Absolute cost advantage		
Government policy		
Expected retaliation		
Threat of new entrants overall rating		

Threat of substitute products or services	The extent that different industries offer substitute products	Rating
Relative price performance of substitutes		
Switching costs		
Buyer propensity to substitute		
Substitutes overall rating		

Porters Five Forces SWOT Analysis

Opportunities	Threats
Strengths	Weaknesses

2.5. Internal Analysis

For further information on your internal analysis, see our [internal analysis pages](#)

Resources	-3	-2	-1	0	+1	+2	+3
Tangible resources							
Products							
Patents							
Assets							
Equipment							
Other							
Intangible Resources							
Employee goodwill							
Customer goodwill							
Reputation							
Other							
Culture							
Leadership							
Innovation							
Risk tolerance							
Results focus							
Other							

Internal SWOT

Strengths	Weaknesses

2.6. Financial Analysis

Ratio	Year				
Current Ratio					
Quick Ratio					
Cash Ratio					
Total debit ratio					
Debit Equity Ratio					
Times Interest Earned					
Return on Equity					
Return on total assets					
Net profit / sales					
Expense / sales					
Asset turnover					
Price Earnings Ratio					

Summary of financial Analysis

2.7. SWOT – Summary

To find out how to do a SWOT analysis, review our [SWOT page](#)

Strengths	Weaknesses
Opportunities	Threats

3. Options

3.1. Option 1

3.2. Option 2

4. Choice – what we are proposing to do

5. Action Plan

No	Action	Due	Owner	Status