

**Strategic Planning Worksheet**

**Introduction**

Creating a strategic plan doesn’t have to be overwhelming. This worksheet by **Compass Consultants** will guide you through each step, helping you build a plan that aligns your goals with your mission and vision. Use this tool to assess where you stand, set clear goals, and develop a path forward.

**How to Use This Worksheet:**

This worksheet is divided into essential sections with prompts and writing space for you to fill out. Use the visual guides to stay organized.

**Vision Statement**

**Where do you want your organization to go?** 📝
Write your vision below:

**Mission Statement**

**Why does your organization exist, and what does it aim to achieve?** 📋
Write your mission below:

**Core Values**

**What values guide your decisions and actions?** ❤️
List your core values:

**SWOT Analysis**

Fill out the table below to identify your strengths, weaknesses, opportunities, and threats.

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| --- | --- |
| **Strengths 💪** | **Weaknesses 🛠** |
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| --- | --- |
| **Opportunities 🌟** | **Threats ⚠️** |
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**Demographics of the Service Area**

**Who is in your service area?** 🌍
Describe key demographics:

**Social Determinants of Health**

**What are the key characteristics of the people you serve?** 🏥
List social factors (e.g., income, education, access to care):

**Stakeholder and Partner Relationships**

**Who are your external stakeholders and partners? How do they support your mission?** 🤝

**Financial Planning**

* **Opportunities 💰:** What financial opportunities can you leverage?
* **Threats 🚨:** What financial risks should you prepare for?

**Regulatory and Legislative Considerations**

**What laws, policies, or regulations impact your organization?** 📜

**Technology Use for Operations and Improvement**

* **Efficient Operations 🖥️:** How does technology support smoother processes?
* **Effective Service Delivery 📲:** How does technology improve services?
* **Performance Improvement 📊:** How does technology help track and improve outcomes?

**Action Plan Template**

Use the table below to break down your goals into manageable steps.

| **Goal 🏆** | **Action Step** | **Responsible Party** | **Deadline** |
| --- | --- | --- | --- |
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**Key Performance Indicators (KPIs)**

**How will you measure success?** 📈
Examples:

* Number of people served
* Client satisfaction rate
* Revenue growth

Write your KPIs below:

**Review and Adjustments**

**Set regular check-ins to review your progress and make changes as needed.** 🔄

| **Date of Review** | **What’s Working?** | **What Needs to Change?** |
| --- | --- | --- |
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**Need Help? Contact Us!**

If you have any questions or need additional support, **Compass Consultants** is here to guide you every step of the way.

📞 **Phone:** 336-879-3899
🌐 **Website:** <https://www.carfaccreditationconsultation.com/>

Let’s navigate your path to success together!