I'm not a robot



When the leadership team defines an organizations vision, they look toward the future and identify the goals and objectives they want to achieve. This is the start of strategic planning. The next step is establishing the sequence in which to realize those goals and objectives. Once the vision is defined, then the practical work begins, and strategic planning templates can facilitate that work. Project and portfolio management templates for Excel and Word, including these strategic planning templates are useful tools for project management offices (PMOs) and portfolio and program managers who oversee multiple projects and ensure theyre aligned with the organizations strategic goals. They cover everything involved in the strategic planning process, from defining the vision statement to creating a roadmap and more. Using premade strategic planning templates is also helpful because theres no busy work involved. All you have to do is add relevant details. Strategic planning documentation. This makes it easier to reference those documents when needed and review them when creating a new long-term plan. While strategic planning templates help get you started, once you execute the strategic plan, youll see their limitations. These are, after all, static documents that must be manually updated which can impact collaboration. Strategic plans are implemented across the organization and departments must work together, share resources and prioritize the common goal. In reality, strategic planning templates arent designed to be that dynamic. Portfolio management software goes where strategic planning templates cannot. Projects and displays them on one Gantt chart. You can manage resources, track time and manage tasks for all your projects in one place. Our roadmap can be filtered by assignee, project manager or customer to help you make forecasts. You can view which projects are opened and whos assigned to what tasks and highlight key metrics to keep stakeholders informed. Get started with ProjectManager today for free ProjectManager strategic Planning Templates for Excel and Word that can help you with every phase of your project and across multiple industries. Below, weve listed 12 free strategic plan templates that can help you get started in reaching your strategic plan is in this free strategic plan template for Word. When completed, youll have defined a strategic target and how to get the entire organization there. It will also show how the organization will track progress to ensure its goals are met over a specific period. Our free strategic plan template has a place to define your vision and mission statements, and even make a SWOT analysis to identify the organizations strengths, weaknesses, opportunities and threats. You can list your business goals, marketing and operational plans, financial projections and the team that will be tasked with meeting your strategic goals. Vision Statement TemplateStrategic planning templates are nothing if theyre not driven by a clear vision. An organizations vision is defined and distributed on a document called the vision statement. It succinctly explains the meaning and purpose of the organization, helping everyone understand its long-term goals. Download our free vision statement for your organization. The vision statement template is made up of five steps, with each associated with a question, to walk you through the process of coming up with the right vision statement for your organization. Strategy Roadmap TemplateOnce you have a vision, you know where you want to be over the next five or so years. Getting there requires a strategy roadmap, which is a tool that visualizes the major phases in your long-term plan to achieve your vision. This is one of the more important strategic planning templates in that it helps you make important decisions in terms of strategy, resource allocation and more. Using our free strategy roadmap template for Excel gives you a high-level overview of the project or multiple projects youll be managing. On the left-hand side, a spreadsheet lists your tasks, start and end dates, including duration. Once those are imputed, they automatically populate the horizontal bar chart to the right. You can color-code the timeline to make it easier to distinguish different projects or phases.4. Strategy Map TemplateA strategy map is another strategic planning template thats also a visual tool. Its used to show the cause-and-effect of an organizations strategic objectives by breaking them into four perspectives: strategic, financial, customer and business process. The strategy map template for Excel is customizable so you can identify your key objectives and place them appropriately across the four perspectives, with arrows showing the cause-and-effect relationships between them. This makes it clear how one objective from one perspectives, with arrows showing the cause-and-effect relationships between them. This makes it clear how one objective from one perspectives, with arrows showing the cause-and-effect relationships between them. threats. Its an analytic tool that organizations use to assess their competitive position and develop long-term planning strategies. This makes it an ideal addition to your strategic planning template as its divided into four quadrants and four descriptors. Strengths are positive and internal to an organization, while weaknesses are negative and external. Using the template helps you sort through this data to inform your strategic planning templates, the first thing you need to define are goals. But those goals should be SMART, as in specific, measurable, attainable, relevant and time-bound. Using our free smart goals. For each, there are a series of questions to answer. This will lead you to the right goals for your organization and its business environment. Organization and the plan, there one last thing you need to do; define the internal structure of your organization. Creating a visual flowchart clarifies who has power over what and who to report or request guidance from. Our free organization run better, which is essential if you want to reach your long-term goals. The tree diagram design makes it easy to see department heads and those who report under them.8. Action Plan TemplateA strategic goal is just an idea until its executed. The ability to turn those goals into actionable tasks requires an action plan, which is a strategic planning template that lists tasks, duration and costs all in one document. Our free action plan template for Excel helps you organize tasks and subtasks by phase and whose assigned to them. In the timeline section, add start and end dates. Be sure to include the materials required to execute those tasks and their associated costs. 9. Resource Plan TemplateGetting everyone up to speed on strategic plans is one thing, scheduling their work is another. Thats why having a resource plan is critical when assembling your strategic planning templates. Using our free resource plan template for Excel helps you schedule your resources. The template has a column to list your resource, including their rate and total cost. The other part of the template is a weekly calendar that allows you to map when you need your resources. 10. Balanced Scorecard Template Another strategic and more traditional financial measures to provide balance in the scorecard. It helps align business activities with the vision and strategy of the organization. The template itself includes categories such as financial, customer, internal processes and learning, although you can add or remove categories as needed. From there, add strategic objectives and key performance indicators to define and set goals, determining how to meet them along the way. As a result of this template, internal and external communication improves while teams can monitor organizational performance against strategic goals.11. KPI Dashboard TemplateKey performance indicators (KPIs) are another good measure of strategic performance as a whole, how can you achieve them? Use this KPI dashboard template to monitor and analyze KPIs to track performance. Its useful for tracking individual, team and department performance in terms of timelines, tasks, workload analysis, resource planning and more. As more data is added to this strategic planning template, its easier to identify and address trends that can negatively impact the project.12. Operational Plan TemplateAn operational plan highlights the specific actions and resources needed to achieve the organizations strategic goals. Usually, the operational plan includes additional details on activities, timelines, objectives, responsibilities and needed resources. The goal is to help deliver on the businesss strategic initiatives. The template itself can cover daily, weekly or monthly timeframes. Its more than a strategic planning template to outline the metrics that measure the progress of the work to keep it on track. How Project Manager Helps With Strategic PlanningStrategic planning templates are helpful. They can organize your thoughts and focus ideas, but they fall short when it comes to planning templates are helpful. They can organize your thoughts and focus ideas, but they fall short when it comes to planning templates are helpful. They can organize your thoughts and focus ideas, but they fall short when it comes to planning templates are helpful. collaborative. ProjectManager is award-winning project and portfolio management software that helps you with strategic planning and monitoring its execution in real time to keep you on track to meet your long-term goals. Manage Resources and Labor CostsWhen you onboard your team to our software, you can set their availability, including PTO, vacation and even global holidays for remote workers. This makes it easy to assign them work. Then toggle over to the workload chart, which is color-coded to make it easy to see your teams workload right from the chart. Our secure timesheets streamline payroll but also allow you to track labor costs and keep to your budget. You can also see how far each team member is in completing their work. Track the Progress and Costs of Strategic Initiatives You can also see how far each team member is in completing their work. Track the Progress and Costs of Strategic Initiatives You can also see how far each team member is in completing their work. 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Creating action plans to reach your strategic goals can be done on our robust Gantt charts or roadmaps, but teams across different departments are going to need different tools to execute their tasks. Our software has multiple project views, from the visual workflow of kanban boards to task lists, sheet and calendar views. Teams can work how they want. All project views update together so everyone is always working on the same page. Project Manager is online project and portfolio management software that connects teams whether theyre in the office, in the field or anywhere in the world. They can share files, comment at the task level and stay updated with email and in-app notifications. Join teams at Avis, Nestle and Siemens who use our software to deliver successful projects. Get started with ProjectManager today for free. By Joe Weller | June 21, 2024 Dive into our curated selection of free templates for strategic planning. 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Learn more about how to do this in ourguide to writing strategic plans or ourarticle on the strategic plans or ourarticle on the strategic plan often covers multiple years and addresses both short-term and long-term goals. It provides a way of tracking progress and measuring success, but its not fixed in stone. Revisit and adjust a strategic plan periodically based on the evolving vision, objectives, needs, and resources of a business or institution. Depending on the scope of your plan, you might be working with a team of multiple stakeholders during the strategic planning process. To keep the process running smoothly, make roles and responsibilities clear. Different parties might be responsible for providing data, reviewing the plan, or authorizing strategic decisions. As you prepare for planning, make sure all participants understand whats involved in the process and have received any relevant information prior to meeting. Many strategic planning frameworks are available to help set you and your team up for success. See this guide to strategic planning models to learn more. Benefits of Strategic planning is beneficial to teams and organizations for several reasons: They help align smaller goals and initiatives with the larger vision of the company, offer clarity on how to address certain challenges, and more. These are some of the top benefits of strategic planning: Better Alignment: The goal of strategic planning is to align the goals of a department or project with larger business objectives, leading to a cohesive and unified direction for the entire organization. Improved Communication: Strategic planning requires clear communication between team members, stakeholders, or clients, resulting in enhanced collaboration across all levels of the organization. Strategic planning helps everyone understand the organization, strategic planning provides clarity on how to deal with internal or environmental changes, helping the organization adapt quickly to new challenges and opportunities. Parts of a Strategic PlanStrategic plans to identify gaps between their current and desired future states, and outlines how to close those gaps. To achieve this, strategic plans should include several key elements, such as a background statement, mission statement, mission statement, and executive summary. Here are the parts that make up most successful strategic plans: Introductory Statement: Briefly describe why the strategic plans about the organization, such as its history, management structure, and supporting partners or agencies. Alternatively, use this section as a brief business statement an elevator pitch to concisely describe your business or organization operates and is structured, from the governing board to staffing. Vision: Briefly describe what your company wants to achieve or become. This is one of the primary organizational tenets to consider, along with values and mission. Values: Outline the principles that your organization stands for and abides by. Many businesses create core value statements to guide company culture. Mission Statement: Describe the purpose of a business or organization. This is distinct from a vision statement because it is not a projected goal for the future. Problem Statement: Outline key or discrete issues that need to be addressed, if applicable. SWOT Analysis: Provide context for your strategy by examining the strengths and weaknesses within an organization, as well as external opportunities and threats. Download one of these freeSWOT analysis templates to get started. Goals: Include long-term and short-term goals when applicable. Objectives should be measurable and broken down into actionable steps. The action plan for each goal should specify who is responsible for implementing the strategy, a timeline for starting and ending the action, and how the outcome will be evaluated. Evaluation: Spell out your chosen methods for evaluating your strategic plan. This might include tracking key performance indicators (KPIs) and documenting the progress of action steps on an ongoing basis. Learn more in this all-inclusive guide to KPI business dashboards. Executive Summary: In this final section, help employees, investors, or other readers quickly understand your plan with a quick summary templates. By Joe Weller | June 21, 2024 Dive into our curated selection of free templates for strategic planning. Whether youre crafting your business model, conducting market analysis, or mapping customer journeys, these templates for Microsoft Word for resources to help you simplify project coordination, improve task oversight, and reach your objectives with ease. 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