



SAMPLE STRATEGIC PLANS

SAMPLE STRATEGIC PLAN DOCUMENTS FROM STRATEGY ROAD...

A significant portion of the value of a facilitated strategic planning process comes from the conversations, the insights, the agreed focus on future priorities and the confirmed positions and pathways determined.

But the documented plan – the physical roadmap of what was agreed about where you’re going, how you’re going to get there and who’s in charge of what – is critical to ensure the best of intentions don’t get left behind on the boardroom table. They are a vital tool to engage and guide the team, to reflect on agreed positions in changing circumstances, and to govern the organisation effectively at all levels. And while the documents should be dynamic and adapted as situations change, creating a clear, high-level picture of what you’ve agreed upon and how you’ll realise your biggest ambitions, gives your organisation a single powerful roadmap that all can align with.

Seasoned strategic planning facilitator **Troy Forrest** has 15 years experience facilitating strategic planning processes and concentrating strategy workshop output into clear, goal-aligned, language-appropriate documents. Troy works to capture a clean, focused picture of your organisations ambitions, agreed priorities and key actions to bring the plan to life.

When Troy’s got the language and framework down pat, enter seasoned graphic designer **Deb Trebilcock** from Coalmine Canary. Deb’s passion is making documents sing – clear, beautiful, accurate reflections of your plan that are easy to follow and easy to love. Deb works with your brand collateral, style guides and

expressions of your business personality to ensure the documents just “fit”. Troy and Deb have worked together for a decade to ensure every client is satisfied with both the strategic planning process and the summary documentation.

While we’d love to show you some real life examples of the remarkable plans we’ve helped more than 100 organisations articulate over the last decade, commercial confidentiality means we have to keep them hidden under a bushel (sorry!)

What we can do though is show you a few made-up examples of the format your documents can take, to give you a sense of how we approach our work, and some of the different styles, formats and content articulations to help you consider what might best fit your organisation.

Here are just three examples of how Strategy Road and Coalmine Canary design Strategic Plans and Strategy Roadmaps. Beyond these, the potential is limitless...





Example 1

Strategic Plan – Agriculture business



MELIORUM AG
BETTER SOILS FOREVER

STRATEGY 2023-26



Vision

A globally sustainable agricultural industry born out of forever healthy soil



Purpose

To champion and enable sustainable farming to the Year 3000



Values

Sustainability. Practicality.
Care. Endeavour.



MELIORUM AG
BETTER SOILS FOREVER



THE HUMANS

- We will nurture and grow a team of values-aligned, suitably skilled and qualified professionals that share our passion for sustainable agriculture and are committed to our long-term sustainability aims
- We will afford our people industry-leading conditions, benefits and enhancement opportunities to support them to do work they're passionate about, and that impacts the future viability of our clients
- We will prioritise the evolution and expansion of client-focused, value-delivering roles that deploy the right skills and capabilities to deliver the impact we seek to make



THE MODEL

- We will structure our organisation in a way that enhances the customer experience at every turn, delivers operational efficiencies through a focus on farmgate decision making, and frees our people up to make choices that benefits both our clients and our business
- We will employ and develop technological solutions and smart systems to streamline our operations, collaborate and align with key long-term supply chain partners, and that extend to our customer interface for an enriched purchasing experience
- We will structure our operations to have feet on the ground where our clients are, serviced by a decentralised business support team, all of whom deeply understand the nuances of where their clients work, live and play



THE OFFERINGS

- We will source and develop product and service offerings that are 100% aligned with supporting sustainable farming for the foreseeable future, and that solve the problems (known and emerging) of our clients in a sustainable, profitable way
- We will employ the insights of our Sustainable Farming Advisory Team, bringing a voice of industry experts, clients and community members, to inform our R, D, E and commercialisation projects and decisions
- We will maximise the lifespan of appropriate existing products in market, while continually seeking more effective, economical and sustainable offerings that meet the evolving needs of our farming customers



THE VOICE

- We will adopt a leadership position in championing and advocating for a globally sustainable agricultural industry and sustainable farming products and practices, practicing what we preach and partnering with similarly aligned enterprises where appropriate for scale impact and message cut-through
- We will ensure there is brand clarity and a depth of understanding in relevant communities about the Purpose, Vision, Values and Priorities of Meliorum Ag, both internally and externally (at government levels, through the supply chain, and in our customer segments)
- We will equip our team with the tools, training and support to be clear, resonant and resilient voices in their interactions with others, to amplify our brand and to affect the market with a very clear message about why engaging with our business is a smart sustainable decision

Strategy 2023 - 2026

THE HUMANS	THE MODEL	THE OFFERINGS	THE VOICE
Thrust	Thrust	Thrust	Thrust
Goals	Goals	Goals	Goals

THE HUMANS	THE MODEL	THE OFFERINGS	THE VOICE
Key Activity Areas	Key Activity Areas	Key Activity Areas	Key Activity Areas
Success Measures	Success Measures	Success Measures	Success Measures



MELIORUM AG
BETTER SOILS FOREVER



Example 2

Strategic Plan – Pizzabox Wines

STRATEGY 2025



WHY WE GET OUT OF BED

To bring a little
somethin' somethin'
to the TV dinner
experience.



WHAT WE DREAM ABOUT

Bootloads of Pizzabox Wines filling
mismatched promo glasses in
loungerooms right around Oz.



OUR VALUES

Fun • Feet-up • Flavour • Friendlies



VALUES UNCORKED



Fun

"It's wine, FFS, enjoy yourself!"



Feet-up

"Whack the trackies on, park your butt, punch the remote, grab a slice and pour a glass. Howbloodygoodsthat?"



Flavour

"I know what I like, and I like the taste of that!"



Friendlies

"A wine shared with mates... doesn't get any better. Cheers!"

GUIDING PRINCIPLES



No BS, DHs or WWs

Face it, the wine world is full of tossers. Bootloads of BS about odours of this and front palates of that. DHs pontificating about provenance and volatiles and boring tosh. W#nkers posting their filtered mugs on the 'gram at another envelope opening, air kissing while slugging a glass of free booze. That ain't us. This is a crew of real people, no pretensions, wanting to make and share super tasty wine that fits the lives and laid back loves of people like us.

Combos that make you go mmm

A kinda inner* bogan bunch, we're unashamedly here to make wines that are bang-on hand-in-glove matches for your Friday-nights-at-home nosh. Sitting on the couch with a slice of Hawaiian, or tucking into a takeout container of Pad Thai, or got the barbie sizzling with pork snags and rissoles (and a curry egg salad at the ready)? We're all about bringing you a glass of wine that works magic with your chosen tucker. What makes us happiest? That moany groany noise when you slump back on the couch, start of the second quarter on the box, and you take a sip of our wine after a mouthful of your grub. Ohhhhyeahhhhhmmrrrhhhg... That's the ticket. (*Some of us are fairly outer bogan too...)

Watering grass roots

Our wine comes from grapes (shocking, right?). Those grapes come from small growers in and around country towns. They're bloody legends, they bust their poopers to help us make your Friday nights more fun, and their communities don't get too many leg ups. So every buck we make, a chunk of it goes back there, into footy and netball clubs, into local markets and school lamo drives and into health and wellbeing initiatives. We're long term committed to them, because they're our mates, and without them, "no wine for you!"

Make a buck to make it last

There are oodles of roads paved with the great intentions of disruptor brands seeking to do cool stuff and have a positive impact on the world. We want that too. We've also seen what happens when good people with good concepts don't have a rigorous business model to sustain their work. As proud as we are about our wines, our people and our brand, we're also very clear we need to run a financially sound business to keep it alive and delighting. So we'll never shy away from asking you to buy another bottle, or to charge you reasonable but fair prices. It's what keeps the funbus moving.

STRATEGIC PRIORITIES

Strategy 2025 incorporates six priority arenas



Products

A stable of tasty, affordable and locally grown & produced wines that match smashingly with Jo and Jenny Jetski's Friday night dinner



Supply chain partners

A solid crew of great grape suppliers paid fair price for quality products, and a trusted band of resellers that work with us fairly, collaboratively and continually spitballing, to make sure we stay ahead of the curve and delighting our clients



Team

A mixed and motley crew of good eggs, committed people, passionate about making clients happy through no BS wine, looked after and supported to spread the joy and grow the brand, and having a hoot along the way



Brand truth

Growing awareness around Oz about who we are, the wines we make and who should buy them, and a team rolling their sleeves up to deliver an experience that more people want in their lives



Financial sustainability

Smart business decisions and sustainable investments in developing and running the business, supporting ambitious but sensible and sustainable growth plans. (In better words, make wines our customers want that make us some money so we can keep doing it)



Communities

Reinvest a portion of profits in the communities of our grape growers, on things they want, need and value (because they help us pick where it goes)

STRATEGIC PRIORITY ARENAS 2023-2025

Products	Supply Chain Partners	Team	Brand Truth	Financial Sustainability	Communities
Goals 2023 - 2025					
Big Projects					
How will we know we're winning?					





PIZZABOX
WINES



Example 3

Strategic Plan –

The Business Helpers Institute



BHI

THE BUSINESS HELPERS INSTITUTE

Supporting the supporters of Australian SMEs

STRATEGY 2025

STRATEGIC PRIORITIES 2023 - 2025



Member engagement & satisfaction
5 year goal - 95%+ A+ rating by members
for value and satisfaction

BHI

THE BUSINESS HELPERS INSTITUTE

Supporting the supporters of Australian SMEs

PURPOSE

To serve and sustain a vibrant, effective
community of professional small business
advisors and service providers around the country

VALUES

Collaboration. Integrity.
Service. Diversity.



Member representation & advocacy

5 year goal - Be a clear, recognised and
powerful voice affecting positive change
for members



Service Packages

5 year goal - A suite of contemporary
curated services delivering exceptional
value to members

HORIZON 1 (1-2 years)



Member engagement & satisfaction

- Voice of member insights plan developed and deployed – focus on dialogue with existing members via multiple channels to understand their continuing and emerging needs, challenges and opportunities (inform future member deliverables plan)
- Baseline NPS establishment – take a pulse check of how members feel their Association is serving them, then develop a 3 horizon response plan to progressively improve and sustain satisfaction levels
- Clearly articulate differentiating value proposition per member insights



Service Packages

- Marketing campaign to members – ensure maximum awareness of existing services offered by BHI to maximise uptake
- Review of existing services by team and select member volunteers – focus on assessing fit for purpose / persisting or emerging member needs; quality and impact of delivery (people, modality, information); and low hanging fruit opportunities to address clearly identified needs



Representation & advocacy

- Define and articulate clear member majority positions on known priority matters influenced by government / industry regulators
- Develop and nurture relationships with key stakeholders, clearly communicating member positions at the right tables and advocating for changes that positively impact our members businesses

HORIZON 2 (2-3 years)



Member engagement & satisfaction

- Finalise & implement 3 year Member Deliverables Plan, advised and co-governed by the member representative committee
- Expand membership per growth targets through targeted BD activities in identified market sectors
- Institute rolling member feedback surveys through identified preferred modalities



Service Packages

- Budgeted expansion of service offerings via member feedback and team research, diversifying services in areas of need plus select speculative / innovative service trials
- Engage select service co-provider partners to enhance the value, reach and impact of services delivered
- Identify and secure diversified funding sources (including grant submissions) to underpin the expansion of service packages



Representation & advocacy

- Develop and communicate formal policy positions on enduring matters that reflect our members positions and interests
- Continue to strengthen and expand relationships with relevant institutions and their representatives to strengthen the perception of BHI as a valid representative voice in key conversations

HORIZON 3 (3-5 years)



Member engagement & satisfaction

- Review and refine Member Deliverables Plan, embedding the voice of members via the representative committee into rolling member engagement initiatives, targeting an annual 95%+ A+ satisfaction rating
- Review and refine the member expansion plan, determining an effective balance between deepening value offerings for existing members and growing membership for scale opportunities (geographic and by verticals)



Service Packages

- Bifurcate the “core services” function and the “adjunct services” arm as an RD&E function, resourcing both arms to strengthen the base and continue to champion innovation in new service areas
- Formalise the service delivery partner network, outsourcing and / or co-delivering defined services where appropriate and in-housing those services key to maximising the BHI member experience
- Undertake and act on a full pricing review to ensure the stratified pricing model offers appropriate value / affordability to member tiers and commensurate returns to BHI



Representation & advocacy

- Work with appropriate bodies to formalise BHI's position as the Peak Body and nominated representative voice of the wider member community
- Establish a formal dialogue rhythm with appropriate groups to communicate, plan and govern changes resulting from BHIs advocacy activities

Priority objectives

Key Projects & Activities

Drivers

Milestone / date

Progress

Member
Engagement &
Satisfaction



Service Packages



Representation &
Advocacy



BHI

THE BUSINESS HELPERS INSTITUTE

Supporting the supporters of Australian SMEs



What do you
need from a
strategic plan?

In addition to concentrated summaries of the strategic plan, your documentation can be custom designed to include a series of appendices, including but not limited to;

- Rear View Analysis – lessons from history to inform the current strategy
- Strategic considerations – reflections on the state of the marketplace, an objective assessment of the current state of the organisation
- Survey results – pre-workshop interviews with customers, suppliers, staff and Board members, highlighting insights needing to be borne in mind when strategic decisions are considered
- PESTLE Analysis
- SWOT Analysis
- Differentiating Value Proposition discussions
- Agreed Standards / Operating Principles
- Governance process

Each and every Strategic Plan or Roadmap document is custom-built to meet the unique needs and wants of your organisation, incorporating your branding, style guides and reflecting your unique personality.

Maybe you're a healthcare organisation needing to prioritise energies in portfolio and pipeline development, talent attraction, and strengthening partnerships with government or regulatory institutions.

Maybe you're a NFP committed to building an engaged, collaborative network of people within the communities you serve, to deal with known and emerging challenges via the power of "together".

Maybe you're a manufacturer focused on bringing disparate elements of a business together in a streamlined, systematic way to realise economies of scale and leverage your expensive technology investments more effectively.

Maybe you're a professional services provider seeking to refine and communicate your differentiated value proposition to your target client audiences, to stand yourselves apart from a growing generic-feeling crowd.

Maybe it's an overt focus on "people" to power your organisation and fulfil your purpose.

Maybe financial returns and savvy cost management is the dominant 3-year priority.

Maybe the most timely issue is ESG and finding the right ways to ensure your longer term impact on the planet is net positive.

Or maybe it's about sell more, to more, with less, for better.

Whatever your strategic issues are and wherever your focus needs to be trained, let Strategy Road support you with proven, experienced facilitation and bespoke roadmap creation services.

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STRATEGY ROAD