



Strategic Planning Agenda Sample

(Company)
(Date/Time)
(Location)

- 1. Coffee and greetings**
- 2. Align Values, Vision and Mission (VVM)**
 - a. Values – Beliefs we share that guide our decisions
 - b. Vision – Our image of who we are and how we want to be remembered
 - c. Mission – What we do each day
- 3. Identify Broad Areas Of Emphasis**
 - a. Categorize – Finance, Marketing, Sales, etc.
 - b. Review & attribute SWOT (strengths, weaknesses, opportunities, threats)
- 4. Establish & Prioritize Objectives**
 - a. Consistent with VVM
 - b. Focused on a result and not an activity
 - c. Attainable
- 5. Establish & Prioritize Goals**
 - a. SMART goals (specific, measurable, achievable, results-oriented, time sensitive)
 - b. Goal setting process – PDCA (plan, do, check, adjust)
 - c. Achievement strategies
- 6. Establish & Prioritize Action Steps**
 - a. Description
 - b. Details
 - c. Owner
 - d. Due date
- 7. Establish Feedback Process And Mechanisms**
 - a. Purpose
 - b. Intervals
 - c. Parties
- 8. Action plan, Lessons Learned And Adjournment**