Strategic plan cheat sheet.

Three parts & 10 steps to maximize your funding

✖ TEAM

1. CORE VALUES

List the qualities of your best people who, if combined into one, could lead you to accomplish your vision.

Single words or simple statements. List 3–5 per person in mind, then combine into ~5 for the organization. Could these be valid in 100 years? Would you hold those values even if one or more of them became a competitive disadvantage?

2. ACCOUNTABILITY CHART

Determine the future org structure — Google the EOS Accountability chart template. Start with three main departments: Fundraising & Comms, Programs, then Finance & Admin.

Map out the roles and five responsibilities for each. Fill out the structure first, then add names. One person can appear in multiple roles, but never two names in one seat.

3. TEAM ANALYZER

Line up your staff against your core values to see if they're the *right person*. And do they get/want the job and have the capacity — are they in the *right seat*?

Google the EOS People Analyzer template. Give people a plus if they embody the core value, a minus if they don't, and a +/− if they sometimes do. Next, mark a Y or N under Get It, Want It, Capacity for It (their job/role).

✖ PRIORITIES

4. WINNING MOVES

Identify three strategic anchors that are used as lenses through which decisions must be viewed.

The Advantage prompts readers to ask "how will we succeed?" *Scaling Up* refers to the similar concept of differentiating activities. I.e., how you deliver your work in a unique way.

5. THREE-YEAR PICTURE

Sketch what your organization will look like three years from now. What are the defining measurables in 8–12 bullets?

There's little value in detailed plans beyond a three-year window. But this exercise allows you to *see* what you're saying. And to determine what must be accomplished in the next 12 months.

6. ANNUAL GOALS

Decide the 3–5 most important things that need to be done (or figured out) as an organization in order to be on track for the three-year picture.

Annual goals generally take 6–12 months to complete. And require a number of people working in subsequent quarters.

7. QUARTERLY ROCKS

Use your annual goals. Under each goal, list the top 3–5 projects that need to be done in the next 90 days.

Rocks take longer than a week but less than three months (avg 1–2 months).

✖ RHYTHMS

8. PROVEN PROCESS

Document the 2–3 most important processes that drive your organization. Assign someone specific accountability for each. Name each process. And decide if you want each process to be better, faster, or cheaper.

Then for each process, list out the 5–10 major steps required (in a couple of words!) with arrows in between. Not all the little details along the way.

9. INTERNAL COMMUNICATIONS

Use a simple text list to decide on your internal comms rhythms. Then book calendar invitations in advance.

There are countless digital tools for team chats, staff input, stakeholder feedback, and performance dashboards. But the key to great internal comms is largely this: consistently getting together as a team and passionately discussing what's important.

10. LEADING & LAGGING KPIs

First, set 6–10 quarterly *lagging* KPIs. These are typically the most important org-level results you'd put in an annual report.

Second, pick 12–15 weekly *leading* KPIs. Take your lagging KPIs. Then list the most critical activities that must happen every week in order to hit your quarterly targets.

👉 Read more: mightyally.org/blog/strategic-planning-align-brand

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