

OUTLIERS BUSINESS STRATEGY CENTRE™

# Strategic Planning Toolkit™

Run a rigorous, end-to-end planning cycle

CEO / Strategy Director / Executive · Flagship Edition 2026

*Publication-ready resource for the Outliers Resource Library*

# 1. Full Guide

Strategic planning translates strategy into a structured, fundable plan. This toolkit gives you the analysis tools, objective-setting templates, initiative planning and the planning cadence to produce a plan the organisation can actually execute.

## Operating lifecycle

1. Analyse — environment (PESTLE, Porter), internal capability, SWOT/TOWS
2. Set direction — vision, objectives, priorities
3. Plan — initiatives, owners, milestones, budgets
4. Resource — allocate capital and capacity
5. Govern — run the planning cadence and review

## Maturity model

L1 Initial	L2 Developing	L3 Defined	L4 Managed	L5 Optimised
Ad hoc / reactive	Some structure	Standardised	Managed & measured	Adaptive & advantage-creating

## Key components

- Environmental analysis
- Strategic objectives
- Initiative portfolio
- Resource allocation
- Milestones & targets
- Planning cadence

# 2. Templates

## Strategic plan template

Vision, objectives, initiatives, KPIs and milestones on a page and in detail.

## Environmental analysis workbook

PESTLE and Porter's Five Forces structured analysis.

## SWOT & TOWS workbook

Generate strategies from strengths/weaknesses against opportunities/threats.

## Objectives & OKR template

Set measurable objectives and key results.

## Annual planning calendar

Sequence the planning cycle across the year.

# 3. Sample Output

*Illustrative strategic objectives (from the Strategic Planning Workbook):*

Objective	Perspective	KPI / Target	Status
Grow revenue 20% in core market	Financial	Revenue +20% YoY	In Progress
Improve retention to 92%	Customer	Retention $\geq$ 92%	In Progress
Reduce cost-to-serve 10%	Internal	Cost-to-serve -10%	Not Started
Build data & AI capability	Learning	2 AI use cases live	Not Started

## 4. Checklists

- Environmental and internal analysis completed
- Vision and strategic objectives defined
- Objectives are measurable with KPIs and targets
- Initiatives identified, owned and sequenced
- Resources and capital allocated to priorities
- Milestones and review cadence set
- Plan approved by the board
- Plan cascaded to business units

### Governance Structure

Strategic planning is governed through the strategy cadence under board oversight:

Layer	Role
Board	Approves strategy and capital; oversees value creation and strategic risk
Strategy / Executive Committee	Owns strategy, prioritises, governs execution
Strategy office / PMO	Runs the cycle, tracks initiatives, maintains the system
Business-unit leaders	Own strategy and delivery in their units
Initiative owners	Deliver initiatives to plan, KPIs and milestones

### Reporting Example

Standard report: executive summary · progress vs target (RAG) · key metrics · risks & decisions.

Metric	Current	Target	RAG	Action
Objectives defined	4	4	Green	Maintain
Plan approved	Yes	Yes	Green	Execute
Initiatives funded	75%	100%	Amber	Complete funding
Cascade complete	60%	100%	Amber	Cascade to all units

### Board Reporting Section

*Illustrative one-page board summary (replace with live data):*

Item	Status	Commentary
Planning maturity	Amber	Defined; disciplined cycle in place; cascade in progress
Plan quality	Green	Objectives measurable and resourced
Risk	Amber	Funding not fully confirmed
Decisions sought	—	Approve remaining initiative funding

### Notes & Disclaimer

*This toolkit is a professional management resource. Calibrate frameworks, scoring, KPIs and governance to your organisation, sector and strategy. Targets and thresholds are illustrative and should be set by leadership.*