



*Get Moving Toward Your Goals:*  
**5 Simple Steps to a  
Great Strategic Plan**

*By: Jenni Catron*



As leaders we are full of **ideas** and **initiatives**.

We see **potential** and **opportunity** all around.

We can almost taste the outcome but oftentimes we get **bogged down** by **how we'll get from here to there**.

The "how" can be **overwhelming** and **discouraging** so we **give up** on our goals or **fail to build a plan** to help us actually **achieve them**.

***These five steps will get you and your team on the path to moving from ideas to action!***

# Step One

## WHERE ARE WE NOW?

“  
***The first task of a leader is to define reality***  
”

***- Max De Pree***

In the 4Sight Sequence for Success we believe the first building block of organizational success is clarity on your mission, vision and values. In order to chart where you want to go you need to be clear about what you're building upon.

Do you have a written vision, mission and values? If so, rewrite them here and spend time reflecting on how these impact where you want to go. If not, review the definitions of each and write out the vision, mission and values that define who you are and what you do.

# VISION

## VISION

a description of where you want to go and the impact you want to make

# MISSION

## MISSION

a definition of who you are and why you do the work you do

# VALUES

## VALUES

a set of guiding principles that clarify the habits and behaviors that are essential to accomplishing your vision and mission

*In addition to defining your vision, mission and values, here are a couple additional exercises to help bring clarity to where you are now.*


## **SWOT ANALYSIS**

**Brainstorm the following:**

**Strengths**

A large, empty rectangular box with a thin orange border, intended for brainstorming strengths.

**Weaknesses**

A large, empty rectangular box with a thin orange border, intended for brainstorming weaknesses.

**Opportunities**

A large, empty rectangular box with a thin orange border, intended for brainstorming opportunities.

**Threats**

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# 4 HELPFUL LISTS

Brainstorm the following:

**What is Right?**

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**What is Wrong?**

A large, empty rectangular box with a thin orange border, intended for brainstorming ideas related to 'What is Wrong?'

**What is Confused?**

A large, empty rectangular box with a thin orange border, intended for brainstorming ideas related to 'What is Confused?'

**What is Missing?**

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## Step Two

# WHERE DO WE WANT TO GO?

*Now that you have a sense of where you are,  
you can begin to define where you want to go.*

**First, define your time frame.**

**Are you building a plan for 6 months, 12 months, 18 months, etc?**

This plan will be completed by:

**Now, let yourself dream!**

**What are your hopes and expectations for what your team could accomplish in this time frame?**

Dream Space:

**Finally, identify the top 3 goals/ideas that you want to pursue.**

- 1)
- 2)
- 3)



## WHAT WILL IT TAKE?

*This is where you'll begin to "put feet to vision", as Jenni Catron likes to say. These next three steps are what differentiate dreamers from doers. Don't quit now. You can do this!*

### Determine what each of these goals will require:

**Goal #1:**

**Time:**

**Budget:**

**Staffing:**

**Other:**

**Goal #2:**

**Time:**

**Budget:**

**Staffing:**

**Other:**

**Goal #3:**

**Time:**

**Budget:**

**Staffing:**

**Other:**



# Step Four

## WHAT IS REALISTIC?

*Now it's time to play devil's advocate. What is really realistic?  
Are your goals doable in this time frame?*

*There is nothing worse than setting a goal that is impossible to achieve.  
Unrealistic goals discourage and demotivate your team. You want to set goals that  
stretch you but are doable with focus and commitment.*

### Revise your goals here if necessary:

1)

2)

3)



## HOW WILL WE GET THERE?

*The more clarity and detail you provide for each goal,  
the greater your chances of achieving that goal.*

**Now it's time to create specific and measurable  
action plans for each goal:**

**Goal #1:**

**Who is responsible for leading this goal?**

**What are the steps necessary to accomplish it?**

**What are key dates/deadlines?**

**Does budget need to be allocated?**

**Goal #2:**

**Who is responsible for leading this goal?**

**What are the steps necessary to accomplish it?**

**What are key dates/deadlines?**

**Does budget need to be allocated?**

**Goal #3:**

**Who is responsible for leading this goal?**

**What are the steps necessary to accomplish it?**

**What are key dates/deadlines?**

**Does budget need to be allocated?**



*To help you on your path to sustaining success, check out the resources The 4Sight Group has to offer:*

### **4Sight Coaching**

Through one-on-one or group coaching, we provide the support and direction to guide you out of the chaos and equip you to thrive as a leader for the long haul.

### **4Sight Consulting**

We offer a variety of options from 2-day strategy sessions to 12 month consulting commitments where we walk you through multiple phases of self-discovery, strategy, team development and implementation.

### **Culture Shock Workshop**

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