

# Simple Strategic Plan for [Business Name]

---

*Prepared by [Name] on [Date]*

**"First say to yourself what you would be;  
and then do what you have to do."  
– Epictetus**

**"Reduce your plan to writing.  
The moment you complete this, you will have definitely  
given concrete form to the intangible desire."  
– Napoleon Hill**

**"Our goals can only be reached through a vehicle of a plan,  
in which we must fervently believe,  
and upon which we must vigorously act.  
There is no other route to success."  
– Pablo Picasso**

**"A good plan violently executed now  
is better than a perfect plan executed next week."  
– George S. Patton**

**"All you need is the plan, the road map,  
and the courage to press on to your destination."  
– Earl Nightingale**

**"Commit to the LORD whatever you do,  
and your plans will succeed."  
– Proverbs 16:3**

## 1. Strengths, Weaknesses, Opportunities & Threats

Conducting a SWOT Analysis is the first step in building your plan of action. Be honest in assessing each area. The rest of your strategic plan is built upon this exercise. Use simple bullet points.

- **Strengths:** Things you do inherently well (where are you remarkable?) and other factors that are working in your favor at this point in time. These are the good things that you can leverage to your advantage.
- **Weaknesses:** Things you don't/can't do well right now. These are areas you need to shore up or eliminate as you move forward.
- **Opportunities:** Things that can take you to the next level once you get going...what can you tap into to get to the next level (specific niches?)? You will need to prioritize your activities to take advantage of these areas.
- **Threats:** Things that are in your way or can take you down (including competition). Counter/eliminate them while moving forward.

Strengths:	
1	
2	
3	
4	
5	
6	
7	

Weaknesses:	
1	
2	
3	
4	
5	
6	
7	

Threats:	
1	
2	
3	
4	
5	
6	
7	

Opportunities:	
1	
2	
3	
4	
5	
6	
7	

## 2. Mission Statement

### *What do YOU want to get PAID to do?*

*The mission statement for your business taps into your passion and begins to define the dream. It should be succinct, clear, and unchanging. This is where you draw the line in the sand and give purpose to your business. What does it exist for? What will it always do, even if the products change over time?*

[Enter Mission Statement Here]

## 3. Corporate Values

### *What does my business stand for?*

*Define the core values of your business (the things you care about). These values will be specific extensions of the mission statement and define why you do it.*

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

### 4. Vision Statement

#### ***What is my vision of what my business will be in 3-5 year's time?***

*A vision statement defines what's possible. While in line with the mission statement, it should provide guidance for the actions you will take within the next 3-5 years. It will change over time, but should be firm enough that it doesn't change daily. It should be big enough to challenge you. Stand in awe of your vision, because once written, it's real and achievable.*

[Enter Vision Statement Here]

### 5. Business Objectives

#### ***What is the purpose for my business? Why does it exist?***

*List the specific things your business needs to accomplish. No more dreaming...these are future accomplishments!*

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

## 6. Key Strategies

### What are the '10,000 ft level' things I must do to achieve my objectives?

Here's where we need to be to prioritize. There are probably a million different things you need to do to grow your business, but you can only do a few at a time.

- **Must Do:** Items are those you are going to give immediate attention to. These are the things that typically have the biggest and most tangible Return on Investment (ROI).
- **Should Do:** This is a holding pen for everything else you need to get done. Promote them as time or opportunities arise, but always act with intention!

#### Must Do

1	
2	
3	
4	
5	

#### Should Do

1	
2	
3	
4	
5	
6	
7	
8	

## 7. SWOT Analysis/Actions

### *How do I use my Strengths, Weaknesses, Opportunities & Threats to my advantage?*

*Look back over your initial SWOT Analysis and develop specific actions to leverage your strengths, mitigate/neutralize your weaknesses, take advantage of your opportunities and eliminate your threats.*

Strengths:	
1	
2	
3	
4	
5	
6	
7	

Weaknesses:	
1	
2	
3	
4	
5	
6	
7	

Threats:	
1	
2	
3	
4	
5	
6	
7	

Opportunities:	
1	
2	
3	
4	
5	
6	
7	

## 8. Major Immediate Goals

### *What will I achieve over the next 90 days that will power my mission & objectives?*

*The key word here is Immediate. Planning too far out can be paralyzing. Instead, just focus on the next 90 days and define specific things you need to achieve to move your business forward. Create a sense of urgency and build some momentum! Be aggressive, but realistic in terms of your resources (time, money, etc.).*

1	
2	
3	
4	
5	

## 9. Action Steps

### *What will I DO to achieve my goals?*

*Your goals for the next 90 days have been defined. Now define the actions needed to accomplish each one. Every goal will have at least one step. Set deadlines, assign resources and get to work!*

	<b>Actions/Tasks</b>	<b>Name</b>	<b>Deadline</b>
1			
2			
3			
4			
5			
6			
7			
8			



*Interested in learning how to use this document more thoroughly and gain additional insights into starting and growing your business?*  
**Consider joining Chuck Bowen and James Woosley at the [Free Agent Academy](#)!**



## CHUCK BOWEN

[ChuckBowen.net](http://ChuckBowen.net)  
San Antonio, TX  
210-200-8520

Chuck Bowen grew up in Claxton, Georgia (*the "Fruit Cake Capital of the World" where Chuck fit in perfectly*), learned his ethics from his role-model, entrepreneur father and graduated from Georgia Tech (*where he learned just how smart fruitcakes have to be to escape engineering school*) as an electrical engineer.

Chuck is founder and president of Chuck Bowen Coaching, LLC. After over 17 years of corporate experience, Chuck decided to follow his passion to mentor others and focus full-time on providing financial, life, career, and entrepreneur coaching to individuals, families, ministries and small businesses.

Chuck comes alongside budding entrepreneurs, coaches and existing small business owners to help them live out their dreams to own and operate profitable, authentic, and self-sustaining businesses. His niche is getting results where others don't -- or can't. Chuck's dream is to leave a legacy characterized and recognized by the sustainable success of his and other's businesses he's helped in some small, yet significant way.

Chuck is co-founder of the [FreeAgentAcademy.com](http://FreeAgentAcademy.com) (with close friend Kevin Miller), compassionately helping his clients create and achieve their vision to thrive. Chuck enjoys an abundant life with his wife, Lori and daughter, Haley in San Antonio, Texas.



## JAMES WOOSLEY

[WoosleyCoaching.com](http://WoosleyCoaching.com)  
Mobile, AL  
251-281-8539

James Woosley is the founder of Woosley Coaching. After 15 years of helping large organizations and companies plan for their future, James is now using his skills and experiences to help small businesses and organizations that are just starting...something that drives his passion for results and growth.

James has a gift for finding patterns in chaos and breaking complex tasks into manageable and achievable pieces—he can see the small things that make the difference between success and failure. According to James, "planning doesn't have to be complicated to be effective...in fact, it's often the simplest plans that get the greatest results."

Armed with "real people" communication skills, "real world" experience as a military officer and project management consultant, and a "real deal" Computer Science degree (to give him nerd credentials), James is applying this strategic ability to help small businesses, start-ups and solopreneurs build plans for greater growth and profitability.

James serves as the Professor for the Roadmap Group at [FreeAgentAcademy.com](http://FreeAgentAcademy.com), where he leads members of the community through the SSP and other tools to help them plan their businesses. James is also the husband to his high school sweetheart Heather and proud father to Anna and Ian.