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BUSINESS & LEADERSHIP GUIDES

Strategic Plan Toolkit

*Your guide to building a clear, actionable, and accountable plan
for your organization.*

How to Use This Toolkit

This toolkit helps leadership teams turn strategy into action. Each page walks through one of The Barzel Group's eight essential components of a strategic plan, meant to be used in conjunction with the [Paterson StratOp](#) process. Use this toolkit in a retreat, workshop, or with your internal leadership team.

You'll find:

- A quick-start summary of the 8 components
- One worksheet per component
- A quarterly review checklist

Let's build a plan you'll actually use.

Note: This guide is **not** a substitute for an actual StratOp session with a trained facilitator. It's intended to get you thinking, not to replace expert support. For the full StratOp experience, [connect with a Barzel Guide](#).

TL;DR: The 8 Components of a Strategic Plan

Component	What It Answers	Why It Matters
Perspective	Where are we now?	Sets a starting point
Vision	Where are we going?	Gives direction
Mission	Why do we exist?	Aligns action with purpose
Core Values	How do we behave?	Guides culture and decisions
Goals & Objectives	What do we want to achieve?	Drives progress
Drivers & Risks	What helps/hurts success?	Identifies leverage points
Action Plan	What are our next steps?	Turns ideas into execution
Quarterly Review	Are we on track?	Keeps momentum and accountability

Component 1: Perspective

Where Are We Now?

Use these tools to assess your current reality.

Breakthroughs:

Battles:

Frustrations:

Failures:

Four Helpfuls List:

- What's Right?
- What's Wrong?
- What's Missing?
- What's Confused?



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Component 2: Vision

Where Are We Going?

Describe your desired future in detail.

3 Years From Now, We...

Look like:

Serve:

Offer:

Are known for:

Are feeling:

Component 3: Mission

Why Do We Exist?

Prompts

- Who do we serve?
- What do we help them achieve?
- What makes our approach unique?
- What are we committed to daily?

Fill in the Blanks

We exist to _____, by _____, for the benefit of _____.

Component 4: Core Values

How Do We Behave?

Prompts

- What gets rewarded here?
- What gets corrected?
- What should clients say about us?

Top 3 Core Values + Behaviors

1. _____ = "We _____."
2. _____ = "We _____."
3. _____ = "We _____."



Component 5: Goals & Objectives

What Do We Want to Achieve?

Use SMART goals (Specific, Measurable, Attainable, Relevant, Time-based)

Goal	Metric	Owner	Due Date

Component 6: Performance Drivers & Risks

What Helps or Hurts Progress?

Top 3 Drivers

1.

2.

3.

Top 3 Risks

1.

Mitigation Plan:

2.

Mitigation Plan:

3.

Mitigation Plan:



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Component 7: Action Plan

What's Next?

Initiative	Owner	Team	Due Date	Deliverables



Component 8: Quarterly Review Checklist

Are We Staying on Track?

Review:

Next Steps:

Reflections:

Want Help?

Get the complete StratOp experience from one of The Barzel Group's seasoned facilitators. From helping you build your plan to running quarterly reviews, we can help.

Schedule a Free Planning Call

Join the Barzel Leadership Circle



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