

Annual Planning Toolkit

Company: _____ Year Being Planned: 20____ Planning Date: _____
Facilitator: _____

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ANNUAL PLANNING OVERVIEW

Duration: 1-2 days (full team offsite recommended) **Attendees:** Leadership team **Outcomes:** Updated Strategic Plan, 1-Year Plan, Q1 Quarterly Goals

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PREVIOUS YEAR REVIEW

Year: 20____

1-Year Plan Goals:

Goal	Target	Actual	% Achieved	Status
1.			____%	✓ ✗
2.			____%	✓ ✗
3.			____%	✓ ✗
4.			____%	✓ ✗
5.			____%	✓ ✗

Overall Achievement Rate: _____%

Key Wins from Last Year

Top 5 Accomplishments:

1.

2.

3.

4.

5.

Lessons Learned

What worked well:

What didn't work:

What to stop doing:

What to start doing:

2 STRATEGIC PLAN ANNUAL UPDATE

Core Values Review

Are these still our Core Values?

Core Value	Keep?	Update?	New Version
1.	☒ ☒		
2.	☒ ☒		
3.	☒ ☒		
4.	☒ ☒		
5.	☒ ☒		

Core Focus Update

Current:

Purpose:

Niche:

Changes needed? ☒ YES | ☒ NO

Updated Core Focus:

Purpose:

Niche:

10-Year Target Progress

Current 10-Year Target:

Progress toward 10-Year Target: _____%

Still accurate? ☒ YES | ☐ NEEDS UPDATE

Updated 10-Year Target (if needed):

3-Year Picture Update

Target Date: _____

Metric	Current	3-Year Target	On Track?
Revenue	\$_____	\$_____	
Profit	\$_____	\$_____	
Customers	_____	_____	
Employees	_____	_____	
Other: _____	_____	_____	

3-Year Picture Summary:

3 MARKET & COMPETITIVE ANALYSIS

SWOT Analysis

Strengths:

Weaknesses:

Opportunities:

Threats:

Competitive Landscape

Top 3 Competitors:

Competitor	Their Strength	Our Advantage	Threat Level
1.			H / M / L
2.			H / M / L
3.			H / M / L

4 NEW YEAR PLAN (20____)

Financial Goals

Revenue: \$_____ Profit: \$_____ (% margin) Cash Flow: \$_____

1-Year Goals (3-7 Goals)

GOAL #1:

Success Metric: _____

GOAL #2:

Success Metric: _____

GOAL #3:

Success Metric: _____

GOAL #4:

Success Metric: _____

GOAL #5:

Success Metric: _____

5 Q1 QUARTERLY GOALS

Company Quarterly Goals for Q1 20____

QUARTERLY GOAL #1:

Owner: _____ | Due: _____

QUARTERLY GOAL #2:

Owner: _____ | Due: _____

QUARTERLY GOAL #3:

Owner: _____ | Due: _____

QUARTERLY GOAL #4:

Owner: _____ | Due: _____

QUARTERLY GOAL #5:

Owner: _____ | Due: _____

6 KEY INITIATIVES FOR THE YEAR

Beyond quarterly goals, what are the major initiatives?

Initiative	Owner	Q1	Q2	Q3	Q4	Success Metric

7 TEAM COMMITMENTS

Each leader shares their #1 commitment for the year:

Name	Commitment

✓ POST-PLANNING ACTIONS

- ☐ Document updated Strategic Plan
- ☐ Share 1-Year Plan with entire company

- ☐ Set Q1 Quarterly Goals in project management
 - ☐ Schedule quarterly planning sessions
 - ☐ Update scorecard with new metrics
 - ☐ Communicate changes to teams
-

Plan and track your annual goals in GoalCadence. Try free for 30 days!

 **Download:** [Microsoft Word \(.docx\)](#)

 **More templates:** goalcadence.com/resources