

Strategic Planning Template

A. Our Mission and Vision

We are a _____ firm offering a broad range of _____ to the _____ Industry
Our driving force is _____ and _____
Our competitive advantage in our marketing is our reputation within the _____

B. Our Desired Future Client Profile

1. New Clients

We seek new clients who have needs within the scope of our services and products and the following characteristics:

We will not accept new clients that:

2. Geographical Focus

We prefer the following geographic areas for new business activities:

3. New Service Development

We will only invest in the development of new services that:

4. Positioning – How do we want to be known? By Whom?

5. Competitive Advantage in the Market

Our competitive advantage is and will be:

6. Marketing Priorities

- | | |
|---|---------|
| a. Developing new client relationships | _____ % |
| b. Deep penetration of current clients with current services | _____ % |
| c. Provision of new services to new client groups | _____ % |
| d. Edging into related new client groups | _____ % |
| e. Improving our visibility and positioning in current targeted industry groups | _____ % |