

A WORKING TOOL · FROM SMALL TO MIGHTY

The Strategic Plan Map

Put the whole strategy on one page.

Three phases, five choices, one page. Score where you are, pick your phase, make the five choices, commit to five initiatives, and finish with a plan on a page your leadership team signs.



Michael Burcham

Type into it or print it. Fill it in with your team, then put page 9 on the wall.

WORKBOOK · 12 PAGES

Put the Whole Strategy on One Page

A strategy that cannot be recited cannot be executed. This workbook turns your plan into a page for the whole team.

Three phases, five choices, one page. Strategy development moves through three phases: planting, growing, and harvesting. Wherever you are, the plan itself always comes down to five choices made in order, from what you stand for to what you must build.

PLANTING

Establish a solid beachhead.
Build momentum for scale.

GROWING

Leverage the foundation.
Expand to adjacencies.

HARVESTING

Compound enterprise value.
Design the next chapter.

THE PATH THROUGH THIS WORKBOOK

1

Score it
Page 3

2

Pick your phase
Page 4

3

Make five choices
Pages 5–6

4

Commit
Pages 7–8

5

One page
Pages 9–10

HOW TO USE THIS WORKBOOK

Do it with the team, not for them. Two leadership sessions of two hours beat one marathon. Disagreement at the table is more useful than forced consensus that papers over a real question.

Write it plainly. Answer every prompt as if a sophisticated investor will read it in 90 days. Vague answers signal a vague strategy.

Then review it quarterly. Update what changed. Carry forward what did not. Do this for three years and the business is materially different.

“The signature is the commitment, not the document. Without it, this is a planning exercise that lives in a drawer.”

The Investor Self-Score

Score the business the way a sophisticated buyer would. Circle one number per row. The lowest score matters more than the average.

WEIGHT	CRITERION · WHAT A 5 LOOKS LIKE	SCORE (CIRCLE ONE)	^x WEIGHT
20%	Differentiation vs. Commodity · Customers buy expertise and outcomes, not just price	1 2 3 4 5	
15%	End-Market Quality · Mission-critical demand in markets that are growing	1 2 3 4 5	
15%	Value-Added Depth · Services and capabilities competitors cannot easily copy	1 2 3 4 5	
15%	Scale & Margin Profile · Margins and EBITDA that signal a healthy model	1 2 3 4 5	
10%	Customer Moat · Low concentration, high retention, hard to displace	1 2 3 4 5	
10%	Management Depth & Succession · A real bench below the CEO	1 2 3 4 5	
10%	Systems & Sophistication · Clean data, disciplined process, numbers you would audit	1 2 3 4 5	
5%	Platform Readiness · A foundation that add-ons and adjacencies can build on	1 2 3 4 5	

HOW TO SCORE IT

- 1. Multiply each score by its weight (a 4 at 20% = 0.80).
- 2. Add the eight results.
- 3. Divide the total by 5.

COMPOSITE SCORE

of 1.00

- Under 0.60 suggests **Planting**
- 0.60 to 0.79 suggests **Growing**
- 0.80 and up suggests **Harvesting**

YOUR LOWEST SCORE

The lowest score is where the next quarter starts.

Where Is This Company Today?

Check the phase that matches where you are, or use the one your score suggests. Each phase changes what strategy, research, and talent should focus on.

PLANTING

☐ OUR PHASE

Establish a solid beachhead. Build momentum for scale.

STRATEGY ASKS

- Where do we want to go?
- How will we win?
- How do we build momentum?

RESEARCH ASKS

- What are the market opportunities?
- Who are our key customers and competitors?

TALENT BUILDS

- Support the executive team
- Identify and develop key leaders
- Define culture and values

GROWING

☐ OUR PHASE

Leverage the foundation for outsized results. Expand to adjacencies.

STRATEGY ASKS

- How do we grow organically?
- Where can we improve consistency?
- Which adjacent markets do we enter now?

RESEARCH ASKS

- How has the market changed?
- Where should we expand?
- What future trends matter as we grow?

TALENT BUILDS

- Expand team capacity
- Grow critical skills
- Strengthen the bench

HARVESTING

☐ OUR PHASE

Compound enterprise value. Design the next chapter.

STRATEGY ASKS

- How do we strengthen our enterprise value drivers?
- What is our 2.0 thesis?

RESEARCH ASKS

- What is driving the market over the next 3 to 5 years?
- What are the most impactful pathways to the next chapter?

TALENT BUILDS

- Invest in team performance
- Enhance functional expertise
- Prepare the C-suite for what comes next

One integrated approach. Strategy tells you where to go. Research tells you what is true. Talent builds the team to get you there. All three evolve together.

Five Choices, Made in Order

Each choice constrains the next. That is what makes it a strategy instead of a wish list.

1

What do we stand for, and where must we be in three years?

Mission, vision, values, and the three-year destination in one plain paragraph. Specific enough that a customer and a competitor would both recognize the description.

2

Where will we play?

Which markets, customers, and geographies. Name the defensible niche where you are demonstrably better than larger competitors, and name who you are competing against.

3

How will we win?

THE RECITE TEST: 30 WORDS OR FEWER

One sentence everyone on the leadership team can recite without notes. What makes you different, and why a customer picks you.

The Numbers, and What You Must Build

4

How will we measure success?

What winning looks like in numbers. The 36-month column is where the strategy becomes a financial story. For example: revenue, EBITDA %, retention.

METRIC	TODAY	12 MONTHS	36 MONTHS

5

What resources and processes are required?

What has to be built or changed to execute. Systems, capacity, capabilities, pricing discipline, and the people to run it all.

Five Initiatives

Choose up to five. Each tied to a choice or a score gap. Each with an owner, a date, and a success measure. No initiative without an owner.

#	INITIATIVE	TIES TO	OWNER	DUE	SUCCESS METRIC · HOW WE WILL KNOW IT WORKED
1					
2					
3					
4					
5					

Ties to: Choice 1 (what we stand for) · Choice 2 (where we play) · Choice 3 (how we win) · Choice 4 (the numbers) · Choice 5 (what we build) · A self-score gap

Threats, Governance, and the Signatures

BIGGEST THREATS TO THE PLAN

The two or three risks most likely to derail this plan in the next 12 months, and the response in plain terms. Who acts. What triggers it.

THREAT	OUR RESPONSE · WHO ACTS, WHAT TRIGGERS IT

GOVERNANCE

Strategy without governance is a wish list. The cadence converts a commitment into a quarterly habit.

EXECUTIVE SPONSOR

REVIEW CADENCE

- ☐ Monthly review, quarterly deep dive
- ☐ Quarterly review with the board
- ☐ Monthly leadership review

LEADERSHIP COMMITMENT

We have read this plan and committed to the initiatives above. We will own the work, the metrics, and the review cadence.

Name, role, signature

Name, role, signature

Name, role, signature

Name, role, signature

COMPANY

PLAN PERIOD

☐ PLANTING ☐ GROWING ☐ HARVESTING

WHAT WE STAND FOR · THE THREE-YEAR DESTINATION

WHERE WE PLAY

HOW WE WIN · THE ONE SENTENCE

HOW WE MEASURE SUCCESS

METRIC	TODAY	12 MO	36 MO

WHAT WE MUST BUILD

THE FIVE COMMITMENTS

#	INITIATIVE	OWNER	DUE	SUCCESS METRIC
1				
2				
3				
4				
5				

EXECUTIVE SPONSOR

REVIEW CADENCE

SELF-SCORE

COMMITTED BY



Seven Tests of a Strong Plan

A strong plan passes all seven. Check each one your plan passes today. Anything unchecked is your next working session.

☐

1 • Clarity

The how-we-win sentence exists and can be recited: 30 words or fewer.

☐

2 • Defined Pathway

A phase is chosen and the three-year destination is written.

☐

3 • Focus

Five or fewer initiatives, every one with an owner.

☐

4 • Foresight

Targets reach past 12 months to the 36-month story.

☐

5 • Robustness

Threats are named and responses are written.

☐

6 • Implementability

Every initiative has a date and a success measure.

☐

7 • Team Alignment

A sponsor, a cadence, and names on the commitment.

All seven pass? Print it, sign it, and put it on the wall.

Stillwater Wellness Group

STRATEGIC PLAN · FY27 THROUGH FY29

GROWING PHASE

WHAT WE STAND FOR · THE THREE-YEAR DESTINATION

We help busy people make recovery and prevention a habit, not a luxury. In three years Stillwater is the region’s leading wellness platform: twelve studios across two metros, a corporate wellness arm serving fifty employers, and a leadership team that runs the business without the founders in every room.

WHERE WE PLAY

Suburban professionals and corporate employers in two metro markets. We compete against boutique studios on consistency and against national chains on quality of care. Our niche is recovery and preventive wellness delivered through memberships and employer contracts, not day passes.

HOW WE WIN

“We make wellness a habit: same practitioner, same standard, every visit, and results you can measure.”

HOW WE MEASURE SUCCESS

METRIC	TODAY	12 MO	36 MO
Revenue	\$14M	\$18M	\$30M
EBITDA %	12%	15%	18%
Membership share of revenue	45%	55%	70%
12-month member retention	62%	70%	80%

WHAT WE MUST BUILD

A general manager bench so every studio runs without the founders, one scheduling and CRM platform across all locations, a practitioner training academy that makes quality repeatable, membership pricing discipline, and a small corporate sales team for employer contracts.

THE COMMITMENTS

#	INITIATIVE	OWNER	DUE	SUCCESS METRIC
1	Launch membership–first pricing	CFO	Q1	55% of revenue from memberships by year end
2	Stand up the practitioner academy	COO	Q2	Every new hire certified before first client; quality scores above 4.8
3	Sign ten corporate wellness contracts	CRO	Q3	Ten employer contracts covering 2,000 employees
4	Build the studio GM bench	CEO	Q4	A named GM in every studio, two ready for multi-site roles

EXECUTIVE SPONSOR

CEO, with the CFO as plan integrator

REVIEW CADENCE

Monthly review, quarterly deep dive

SELF-SCORE

0.69 of 1.00

COMMITTED BY

J. Marsh, CEO · T. Okada, CFO · L. Rivers, COO · K. Bennett, CRO

THE LAST WORD

*“Where you choose to win matters more than how hard
you choose to compete.”*

Review the plan every quarter. Update what changed. Carry forward what did not.



Michael Burcham