THREE PHASES · FIVE CHOICES · ONE PAGE

PLANTING
Establish a solid beachhead. Build momentum for scale.

GROWING
Leverage the foundation for outsized results. Expand to adjacencies.

HARVESTING
Compound enterprise value. Design the next chapter.

"Where you choose to win matters more than how hard you choose to compete."

THE TOOLKIT · A LEADER'S GUIDE

The Strategic Plan Map

A strategic planning model that puts the whole strategy on one page, and gets the whole team behind it

Most strategic plans fail in one of two ways. They are too vague to act on, or too long to remember. The Strategic Plan Map fixes both. It takes a leadership team through a structured set of choices and ends with a single page the team can recite, sign, and review every quarter.

A strategy that cannot be recited cannot be executed.

INSIDE THIS GUIDE

1. The model at a glance: understand, choose, commit, run
2. Know your stakeholders and assess the landscape
3. Score where you are, and pick your phase
4. Make the five choices, in order
5. Define the financial end game
6. Commit to five initiatives, name the threats, set governance
7. The seven tests of a strong plan
8. A sample plan on a page, a session guide, and a blank worksheet

MB

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THE MODEL AT A GLANCE

Understand. Choose. Commit. Run.

Four stages, eight steps. Each stage earns the next, and the output of each one feeds the plan on a page.

1 · Understand

Learn what is true before you choose.

1. Know your stakeholders
2. Align on vision, mission, and values, and assess the landscape

2 · Choose

Decide where you are and where you will win.

3. Score where you are
4. Pick your phase
5. Make the five choices

3 · Commit

Turn choices into owned work.

6. Define the financial end game
7. Five initiatives, threats, and responses

4 · Run

Make it a habit, not a document.

8. Governance, sign-off, and the quarterly review

What the plan contains

ELEMENT	THE QUESTION IT ANSWERS
Phase	Where is this company in its development?
What we stand for	What is our purpose, and where must we be in three years?
Where we play	Which markets, customers, and geographies?
How we win	What makes us different, in one recitable sentence?
How we measure success	What does winning look like in numbers, today, at 12 months, at 36?
What we must build	What resources and processes are required?
The five commitments	Who owns what, by when, measured how?
Threats, sponsor, cadence, signatures	What could derail us, and how will we keep the plan alive?

Five principles for using it

1. **Do it with the team, not for them.** Two leadership sessions of two hours beat one marathon.
2. **Write it plainly.** Answer as if a sophisticated investor will read it in 90 days. Vague answers signal a vague strategy.
3. **Write down the disagreement.** It is more useful than a forced consensus that papers over a real question.
4. **Sign it together.** The signature is the commitment, not the document.
5. **Review it quarterly.** Do this for three years and the business is materially different.

STAGE 1 · UNDERSTAND · STEPS 1 AND 2

Start With the People You Serve

Before you choose a strategy, know whose objectives it must meet and what your organization stands for.

Step 1 · Know your stakeholders

Identify your top five or six stakeholders: typically customers, employees, ownership, partners, and the community. For each one, complete a one-page profile.

THE ESSENTIAL QUESTIONS

- Who are our key stakeholders?
- What matters to them?
- Who else is in our "ecosystem"?
- What about our value proposition speaks to each?
- How will they feel the value we deliver?

STAKEHOLDER PROFILE · ONE PER STAKEHOLDER
What matters most to them?
How can we be the best partner?
Why should they choose us?
Our value proposition for them

Step 2 · Align on vision, mission, and values, then assess the landscape

VISION, MISSION, AND VALUES

- What is our organization's purpose? Why does it exist?
- Where are we headed? If we achieved our goals, how would we look in five years?
- What beliefs guide our decisions?
- What conduct should our team uphold?

THE STRATEGIC ASSESSMENT

Look in four directions:

- **Industry and markets:** where we will compete, and the trends that worry us and excite us.
- **External and competitive:** who we compete against and how.
- **Customer and end user:** the real pain we solve.
- **Internal:** what we are good at, and where we are limited.

INDUSTRY TRENDS

Two columns: **worries** and **opportunities**. List what is moving in your market over the next three to five years.

COMPETITIVE POSITIONING

For your top three competitors: profile, target customer, message, pricing, strengths, and deficits. Then: how should we position, why do their customers pick us, and what is required to beat them?

INTERNAL SURVEY

Survey your team and group the answers into management themes. Ask: what are we really good at? What should we start, stop, and keep doing? What will our customer experience difference be?

STAGE 2 · CHOOSE · STEP 3

Score Where You Are Today

Score the business the way a sophisticated buyer would. The lowest score matters more than the average.

The investor self-score

WEIGHT	CRITERION	WHAT A 5 LOOKS LIKE	SCORE 1 TO 5
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 and 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 and succession**	A real bench below the CEO	1 · 2 · 3 · 4 · 5
10%	**Systems and 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

COMPUTING THE COMPOSITE

Multiply each score by its weight and add them up. Divide by 5. The result runs from 0.20 to 1.00.

BELOW 0.60	0.60 TO 0.80	0.80 AND UP
Suggests Planting	Suggests Growing	Suggests Harvesting

IN THE SAMPLE COMPANY

Scores of 4, 4, 3, 3, 2, 3, 3, 4 produce a weighted sum of 3.30. Divided by 5, the composite is **0.66**, which suggests the **Growing** phase.

The lowest score is **Customer moat (2)**. That is where the next quarter starts.

THE ONE QUESTION

Of the eight criteria, which one, if fixed in the next 12 months, would move the most other scores forward at the same time? That is where your initiatives should start.

How to run it: have each leader score independently before the session, then compare. Large gaps between scorers are the most valuable part of the exercise.

STAGE 2 · CHOOSE · STEP 4

Pick Your Phase

Each phase changes what strategy, research, and talent should focus on. The score suggests a phase; the team decides.

	PLANTING	GROWING	HARVESTING
Objective	**Establish a solid beachhead. Build momentum for scale.**	**Leverage the foundation for outsized results. Expand to adjacencies.**	**Compound enterprise value. Design the next chapter.**
Strategy asks	Where do we want to go? How will we win? How do we build momentum?	How do we grow organically? Where can we improve consistency? Which adjacent markets do we enter now?	How do we strengthen our enterprise value drivers? What is our 2.0 thesis?
Research asks	What are the market opportunities? Who are our key customers and competitors?	How has the market changed? Where should we expand? What future trends matter as we grow?	What is driving the market over the next 3 to 5 years? What are the most impactful pathways to the next chapter?
Talent builds	Support the executive team Identify and develop key leaders Define culture and values	Expand team capacity Grow critical skills Strengthen the bench	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.

How to choose

- Start with the phase the composite suggests.
- Test it against the phase objectives. Which sentence describes the work in front of you?
- If the team splits between two phases, pick the earlier one. The work of the earlier phase is rarely finished.

IN THE SAMPLE COMPANY

The composite of 0.66 suggests **Growing**, and the team agrees: the foundation works, consistency is uneven, and two adjacent states are the obvious next market.

STAGE 2 · CHOOSE · STEP 5

The Cascade of Choices

Five choices, made in order. Each one 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.

Sample: We keep essential facilities running for the customers who cannot afford downtime. In three years we are the region's first-call service partner in two adjacent states, roughly twice today's revenue, with a leadership team that runs the business without the founder in the room.

2

WHERE WILL WE PLAY?

Which markets, customers, and geographies. Name the defendable niche where you are demonstrably better than larger competitors, and name who you compete against: national, regional, and local alternatives.

Sample: Mid-sized industrial and commercial facilities within a 300-mile radius, where national providers are too slow and local shops are too shallow. Our niche is scheduled maintenance contracts, not one-off jobs.

3

HOW WILL WE WIN?

One sentence everyone on the leadership team can recite without notes. What makes you different, and why a customer picks you. Ground it in the top three customer pain points you solve and your three points of difference.

Sample: "We answer in one hour, fix it the first time, and prove it with data no competitor shows."

4

HOW WILL WE MEASURE SUCCESS?

What winning looks like in numbers: today, at 12 months, and at 36 months. The 36-month column is where the strategy becomes a financial story. (See the financial end game on the next page.)

5

WHAT RESOURCES AND PROCESSES ARE REQUIRED?

What has to be built or changed to execute. Work through the operating levers: **pricing discipline** (floors, discount authority, exceptions), **service model**, **capacity or inventory**, **sales focus** (and what gets deprioritized), **digital and process**, and **people and talent** (hiring, development, succession, decision rights).

Sample: A second-tier leadership bench, a dispatch system that removes the whiteboard, contract pricing discipline, and a technician training pipeline.

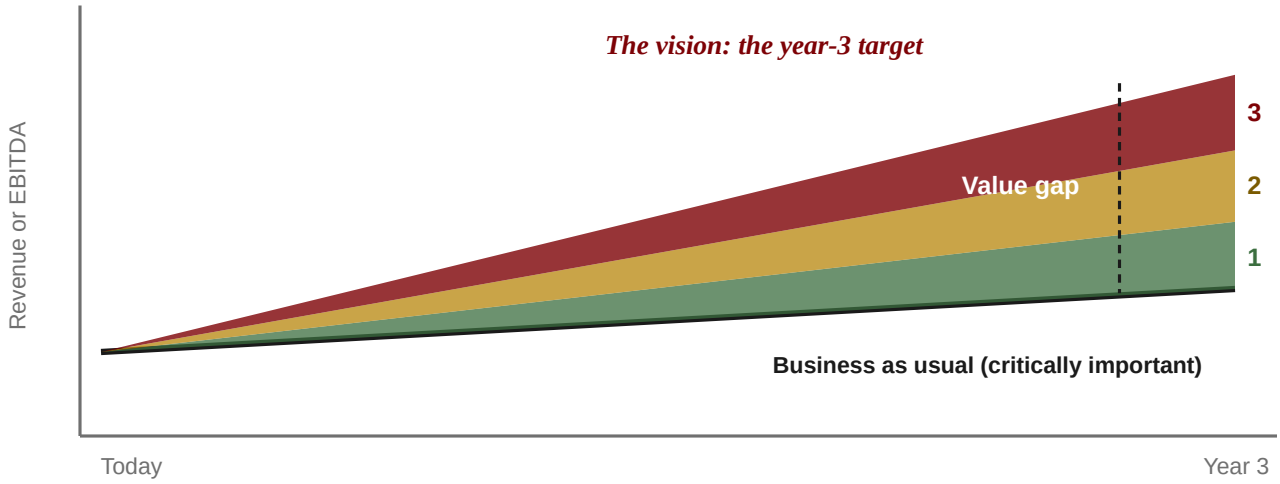
THE RECITE TEST

If the team cannot say Choice 3 without notes, it is not a strategy yet. Aim for 30 words or fewer: a sentence that fits in one breath.

STAGE 3 · COMMIT · STEP 6

Define the Financial End Game

Business as usual will not close the gap. Name the gap, then name the strategies that close it.



"We will grow revenue (or EBITDA) to $_____ by _____ through (i) _____, (ii) _____, and (iii) _____."

The targets that tell the story

IN THE SAMPLE COMPANY

METRIC	TODAY	12 MO	36 MO
Revenue	$38M	$46M	$72M
EBITDA %	11%	13%	16%
Recurring contract revenue	31%	40%	55%
Top-5 customer concentration	41%	35%	25%

METRICS WORTH CONSIDERING

Revenue · Gross margin % · EBITDA $ and % · Working capital (inventory turns, DSO, DPO) · Customer concentration · Retention or share of wallet · Employee turnover · Your service or quality standard

WORKING CAPITAL FOCUS

Working capital is the difference between growth that funds itself and growth that strangles you. Name the lever you will pull first, and the top three financial priorities for the next 12 months, in plain language.

STAGE 3 · COMMIT · STEP 7

Five Initiatives. Every One Owned.

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

IN THE SAMPLE COMPANY

#	INITIATIVE	OWNER	DUE	SUCCESS METRIC
1	**Launch contract-first sales model** *Choice 2: where we play*	CRO	Q2	40% of revenue under contract by year end
2	**Stand up dispatch and scheduling system** *Choice 5: what we build*	COO	Q3	First-time-fix above 85%, response under 60 minutes
3	**Build the leadership bench** *A self-score gap*	CEO	Q4	Named successor for every key seat, two ready now
4	**Install pricing guardrails** *Choice 4: the numbers*	CFO	Q1	Floor prices live, exceptions below 5% of quotes

THE INITIATIVE CHARTER

For each initiative, one page:

- Project objective and description
- The strategic area it addresses
- Project leader and team
- Run-rate financial goals and required investments
- KPIs: current and target
- Interdependencies: who else must deliver
- Risk factors and mitigants

WHERE INITIATIVES COME FROM

Group them across five areas so nothing critical is missing: **growth**, **productivity**, **finance and compliance**, **information technology**, and **organization effectiveness**.

BIGGEST THREATS TO THE PLAN

Name the two or three risks most likely to derail the plan in the next 12 months, and the response in plain terms: who acts, and what triggers it.

Sample threat: A national provider drops price to buy the market. **Response:** Defend on speed and proof, not price. The CFO triggers the response playbook if two contract renewals are lost in one quarter.

STAGE 4 · RUN · STEP 8

Governance & Commitment

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

EXECUTIVE SPONSOR

One person who owns the plan overall and integrates the initiatives.

REVIEW CADENCE

Monthly review, a quarterly deep dive, and dates set for all four quarterly reviews before the year starts.

LEADERSHIP COMMITMENT

"We have read this plan and committed to the initiatives. We will own the work, the metrics, and the review cadence." Then everyone signs.

Tracking the plan

Use three instruments: a **balanced scorecard** of the targets, **cascading objectives** so every department knows its part, and **early warning reports** that surface trouble before the quarterly review does.

Every plan is tested for

TEST	THE QUESTION	THE PLAN PASSES WHEN
Clarity	Is it clear to everyone what we are and are not going to do?	The how-we-win sentence exists and can be recited.
Defined pathway	Do we know where we are and where we are going?	A phase is chosen and the three-year destination is written.
Focus	Does it help the team prioritize their work?	Five or fewer initiatives, every one with an owner.
Foresight	Are the choices consistent with market trends?	Targets reach past 12 months to the 36-month story.
Robustness	Do the choices hold true in the light of uncertainty?	Threats are named and responses are written.
Implementability	Are the choices supported by concrete policies and actions?	Every initiative has a date and a success measure.
Team alignment	Are the leaders committed, and are the choices consistent with one another?	A sponsor, a cadence, and names on the commitment.

The bar: a strong plan passes all seven tests. Print it, sign it, and put it on the wall.

THE OUTPUT

The Plan on a Page

If the team cannot see it, they cannot run it. This is the page that goes on the wall. Here is the sample company's.

Sample: Beacon Field Services

STRATEGIC PLAN · FY27 THROUGH FY29

GROWING PHASE

WHAT WE STAND FOR · THE THREE-YEAR DESTINATION

We keep essential facilities running for the customers who cannot afford downtime. In three years we are the region's first-call service partner in two adjacent states, roughly twice today's revenue, with a leadership team that runs the business without the founder in the room.

WHERE WE PLAY

Mid-sized industrial and commercial facilities within a 300-mile radius. Scheduled maintenance contracts, not one-off jobs.

HOW WE WIN

> *"We answer in one hour, fix it the first time, and prove it with data no competitor shows."*

HOW WE MEASURE SUCCESS

METRIC	TODAY	12 MO	36 MO
Revenue	$38M	$46M	$72M
EBITDA %	11%	13%	16%
Recurring revenue	31%	40%	55%
Top-5 concentration	41%	35%	25%

WHAT WE MUST BUILD

A second-tier leadership bench, a dispatch and scheduling system, contract pricing discipline with floor prices and an exception process, and a technician training pipeline.

THE COMMITMENTS

#	INITIATIVE	OWNER	DUE	SUCCESS METRIC
1	Launch contract-first sales model	CRO	Q2	40% of revenue under contract
2	Stand up dispatch and scheduling	COO	Q3	First-time-fix above 85%
3	Build the leadership bench	CEO	Q4	Successor for every key seat
4	Install pricing guardrails	CFO	Q1	Exceptions below 5% of quotes

SPONSOR
CEO, with the CFO as integrator

CADENCE
Monthly review, quarterly deep dive

SELF-SCORE
0.66 of 1.00

COMMITTED BY
CEO · CFO · COO · CRO

HOW TO USE IT

Running the Planning Sessions

Prepare before you meet. Decide in two sessions. Review every quarter.

BEFORE THE SESSIONS

- Profile the top five or six stakeholders
- Run the internal team survey and group the themes
- Gather industry worries and opportunities
- Complete the competitive positioning grid
- Each leader completes the self-score alone

SESSION 1 · TWO HOURS

- Confirm vision, mission, and values
- Compare self-scores; agree on the composite and the phase
- Make Choices 1 through 3
- Record disagreements in writing

SESSION 2 · TWO HOURS

- Make Choices 4 and 5
- Define the financial end game
- Commit to five initiatives with owners
- Name threats and responses
- Set sponsor and cadence; run the seven tests; sign

The quarterly review

AGENDA ITEM	WHAT TO ASK
Targets	Are we on track against the 12-month column? What does the 36-month story look like now?
Initiatives	For each one: on track, at risk, or off track? What does the owner need?
Self-score	Has the lowest score moved? Is it still the right place to focus?
Threats	Has any trigger fired? Has a new threat appeared?
The choices	Has anything changed that should change where we play or how we win? Update what changed. Carry forward what did not.

Common traps

1. **Skipping the order.** Jumping to initiatives before Choices 1 to 3 produces a to-do list, not a strategy.
2. **Too many initiatives.** More than five means the team has not made choices yet.
3. **Polishing instead of deciding.** Fill it in by hand first. Honest answers beat formatted ones.
4. **No signatures.** Without them, this is a planning exercise that lives in a drawer.

PLAN ON A PAGE · WORKSHEET

Company: _____

Plan period: _____

Phase: Planting | Growing | Harvesting

1 · WHAT WE STAND FOR · THE THREE-YEAR DESTINATION

2 · WHERE WE PLAY · OUR DEFENDABLE NICHE · OUR COMPETITORS

3 · HOW WE WIN · ONE SENTENCE, 30 WORDS OR FEWER

4 · HOW WE MEASURE SUCCESS

METRIC	TODAY	12 MO	36 MO

5 · WHAT WE MUST BUILD

SELF-SCORE COMPOSITE: _____ LOWEST: _____

THE FIVE COMMITMENTS

#	INITIATIVE	OWNER	DUE	SUCCESS METRIC
1				
2				
3				
4				
5				

BIGGEST THREATS · AND OUR RESPONSE (WHO ACTS, WHAT TRIGGERS IT)

EXECUTIVE SPONSOR

REVIEW CADENCE

QUARTERLY REVIEW DATES

LEADERSHIP COMMITMENT · NAME, ROLE, SIGNATURE