

20X1 OPERATIONAL PLAN

Sample Only

Strategic Objectives: (These should support your Mission, drive towards your Vision & integrate w/one another. These outline **WHAT** you want to do.)

1 - (sample only) **Enhance Market Position** - Become the Go-To provider in the mid-Atlantic region for selection, service, and quality.

2 - (sample only) **Increase Products & Services** - Broaden our offerings & provide cloud-based product/service options.

3 - (sample only) **Strengthen Finances** - Strengthen the financial stability across our field of offerings.

4 - (sample only) **Develop Talent Organization-wide** - Create deep talent organization-wide to support flexibility in workflow, workforce and succession planning needs.

Year 1 (20X1) Strategic Goals: (See prior page. These should start moving you towards the Strategic Objective in the left column. These outline **HOW** you're going to make each one happen.)

1. By April 30, 20X1, complete a market & customer needs assessment to determine needs, value, product/service mix, targeted tiers, and trends.
2. By June 30, 20X1, create a 3 Year Marketing Plan.

1. By June 30, 20X1, create a 3 Year Product & Services Offerings Plan.
2. By Dec 31, 20X1, have a fully functional R&D department established to stay ahead of trends.

1. By June 30, 20X1, create and implement an on-going, 3 Year Finance & Operations Management Plan that integrates support, training, revised product offerings, etc to outlets with targeted metrics to enable product/offerings decisions more quickly.

1. By Aug 31, 20X1, create an Emergency Staffing Plan, and Workforce and Succession Plans.
2. By Sept 30, 20X1, create and implement an on-going, 3 Year Staff Training & Development Plan that enhances flexibility of staff movement, supports workforce & succession planning, and creates IDPs for all staff.

Year 1 (20X1) Operational Goals: (These provide the breakdown and detail of the various strategic goals listed for each year. Again, write these as SMART Goals.)

- 1.1.1 - By Jan 31, 20X1, select vendor for market & customer needs assessment.
- 1.1.2 - By Feb 28, 20X1, complete study format, parameters and questions.
- 1.1.3 - By March 31, 20X1, start assessment.

- 1.2.1 - By April 30, 20X1, complete Marketing Plan format template.
- 1.2.2 - By May 15, 20X1, complete analysis verification and validation.
- 1.2.3 - By June 30, 20X1, complete final draft of Marketing Plan

- 2.1.1 - By April 30, 20X1, complete Product & Service Offerings Plan format template.
- 2.1.2 - By June 1, 20X1, complete analysis verification and validation.
- 2.1.3 - By June 30, 20X1, complete final draft of Product & Services Offerings Plan.
- 2.2.1 - By April 30, complete R&D Department 3 Year Plan to outline ramp-up, responsibilities, staffing needs, resource needs, and anticipated deliverables,.

- 3.1.1 - By April 31, 20X1, complete Finance & Operations Management Plan format template.
- 3.1.2 - By June 1, 20X1, complete analysis verification and validation.
- 3.1.3 - By July 30, 20X1, complete communication plan, roll-out and on-site training portion of plan.
- 3.1.4 - By Aug 31, 20X1, complete final draft of Finance & Operations Plan.

- 4.1.1 - By April 30, 20X1, complete Short Term/Emergency and Long-Term Workforce/Succession Plan format templates.
- 4.1.2 - By May 15, 20X1, complete meetings with all management to ID staffing/training needs.
- 4.1.3 - By July 30, 20X1, complete communication plan.
- 4.1.4 - By Aug 31, 20X1, complete final draft of Emergency Staffing Plan, and Workforce and Succession Plans.



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4 - (sample only) **Develop Talent Organization-wide** - Create deep talent organization-wide to support flexibility in workflow, workforce and succession planning needs.

5 - (sample only) **Enhance Efficiencies** - Enhance operational efficiencies, streamline, identify better delivery vehicles/software.

- 4.2.1 - By March 15, 20X1, complete training all managers on identifying competencies and missing skill sets.
- 4.2.2 - By April 30, 20X1, complete Individual Development Plan (IDP), training matrices, training plans, and curriculum templates.
- 4.2.3 - By April 30, 20X1, identify at least 3 vendors to support anticipated technical & soft skills training needs; in-house, virtually, and off-site as appropriate.
- 4.2.3 - By June 30, 20X1, complete draft of first 3 year curriculum and participant lists.
- 4.2.4 - By July 31, 20X1, select training vendors as appropriate.
- 4.2.5 - By Sept 30, 20X1, complete kick-off training program.

- 1. By March 31, 20X1, document critical processes for all positions.
- 2. By July 31, 20X1, complete critical process reviews, Best Practices determinations, task re-alignments, and position descriptions revisions.
- 3. By Nov 31, 20X1, develop 3 Year Efficiency Enhancements Plan to enhance efficiencies organization-wide.

- 5.1.1 - By March 1, 20X1, complete critical process templates and training all staff on identifying and documenting critical processes.
- 5.2.1 - By April 30, 20X1, complete critical process reviews & Best Practices determinations with teams.
- 5.2.2 - By May15, 20X1, meet with HR to begin task realignments and position description revisions.
- 5.2.3 - By June 30, 20X1, start staff communications/training to re-align position responsibilities to enhance efficiencies.
- 5.3.1 - By July 31, 20X1, complete draft 3 Year Efficiency Enhancements Plan Template.
- 5.3.2 - By Sept 30, 20X1, complete data gathering from all staff on efficiency enhancements, equipment upgrades, etc needed.
- 5.3.3 - By Nov 31, 20X1, develop 3 Year Efficiency Enhancements Plan to enhance efficiencies organization-wide.

Notes: