



# Strategic Planning Worksheet

## Clarify your business model with QUAD Model

Companies big and small sit at the crossroads of complexity and growth. Bringing together design thinking, agile, lean, and other business methods, QUAD Model is an evolved business operating system focused on clarity and action.

Housing a set of systematic management techniques designed for business process improvement that is connected to values, QUAD Model can help you take on your toughest projects and accomplish your biggest goals by clarifying your business model.



# The Big Picture

This QUAD represents the big picture of why you are in business and the values that drive your culture. Your position is what sets you apart and your promise is the most important aspect of your service that you want to offer. This QUAD is your anchor, keeping solutions and improvements connected to your "why".

## Instructions

**Values:** What are some things that drive you as individuals and as a team?

(ex: Apple - Innovation, Inclusion, Simplicity)

**Vision:** Can you visualize the impact you want the business to have?

(ex: Apple - "We want Apple to be a reflection of the world around us.")

**Position:** What are the three things that make you unique? The likelihood of sharing all 3 with a competitor is not likely.

(ex: Apple - great products, think different, simple to use)

**Promise:** What can you confidently promise to your customers?

(ex: Apple - "We want Apple to be a reflection of the world around us.")

## Values

## Vision

## Promise

## Position

# The Road Forward

The rationale for this quadrant is to develop a path laying out where we ultimately want to be and the phase lines to get us there. The information here is all driven by the previous “Big Picture” section.

## Instructions

**10 Year:** Also known as your big hairy audacious goal (BHAG). We start this far out in time because you should design a future state that is bigger than what you can see now.

**3 Year:** Three-year goals should paint an achievable picture for your people. This should be the factor that attracts employees who are on board or pushes people out who don't fit.

**1 Year:** With the three-year picture in mind, it is more realistic to determine what you must do in the next 12 months to stay on track. Keep one thing in mind, less is more.

**Quarter:** Even though this is technically 3 months out, in terms of the pace of business it is right on top of you. Goals here should be based in that reality but serve as the foundation for Year 1.

## 10 Year

## 3 Year

## Quarter

## 1 Year

# Solve

The Solve Quadrant is where we take the big pieces from the Quarter Quadrant and develop action items for each. The best way to do this is to develop a "how" or "what" question for the goal. This approach also brings us into a brainstorming phase where the team can offer new ideas on how to accomplish the goals at hand.

## Instructions

**Solve 1:** Solve 1 is your top priority. Form your question first, then brainstorm solutions.

**Solve 2-4:** These are next priorities to come after your top priority. Form your question first, then brainstorm solutions.

Example:

How can we prepare to go public?

- Know current value proposition
- Board of directors in place
- Develop message to investors

## Solve 1

## Solve 2

## Solve 3

## Solve 4

# Action Items

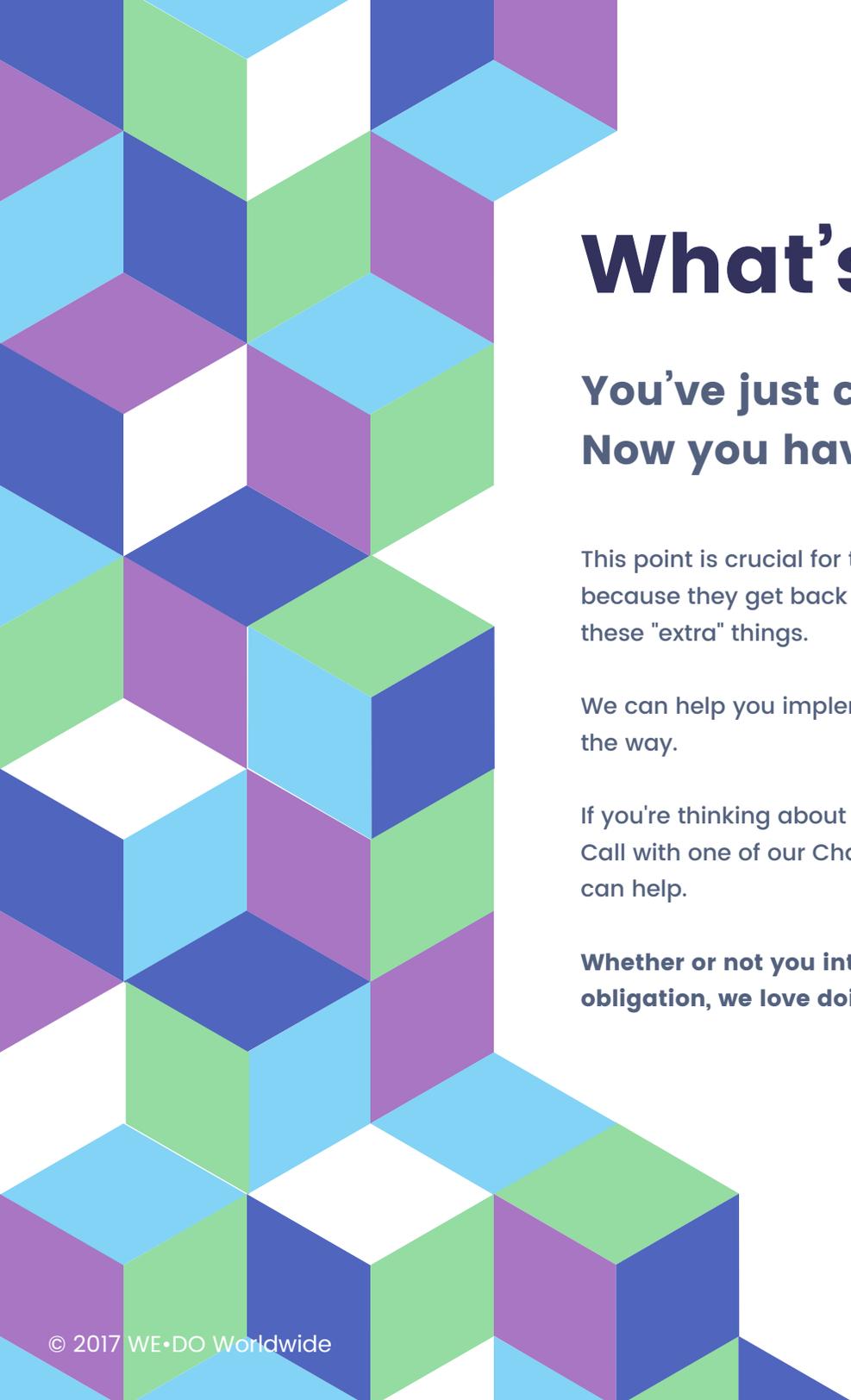
Now we are into the breakdown of larger pieces we want to accomplish. The following are actionable items tied to each larger element. Each action is paired with an assigned owner and given due dates to be accomplished.

Example:

3	Brand identity refresh	Mike	1/25/18
---	------------------------	------	---------

## Actions to Complete

#	Action Item	Person	Due
1			/ /
2			/ /
3			/ /
4			/ /
5			/ /
6			/ /
7			/ /
8			/ /
9			/ /
10			/ /



# What's the next step?

**You've just created an awesome plan.  
Now you have to make it happen.**

This point is crucial for the success of the entire project. Often teams get this far and lose steam because they get back to their usual daily workflow and find they don't have time to work on these "extra" things.

We can help you implement your new, clarified business model and champion the process along the way.

If you're thinking about implementing QUAD Model in your business, schedule a free Discovery Call with one of our Champions. Our call will give us an opportunity to explain how our system can help.

**Whether or not you intend to hire a professional to help you, this is a critical step. There's no obligation, we love doing it, and it's free!**

 **QUAD**