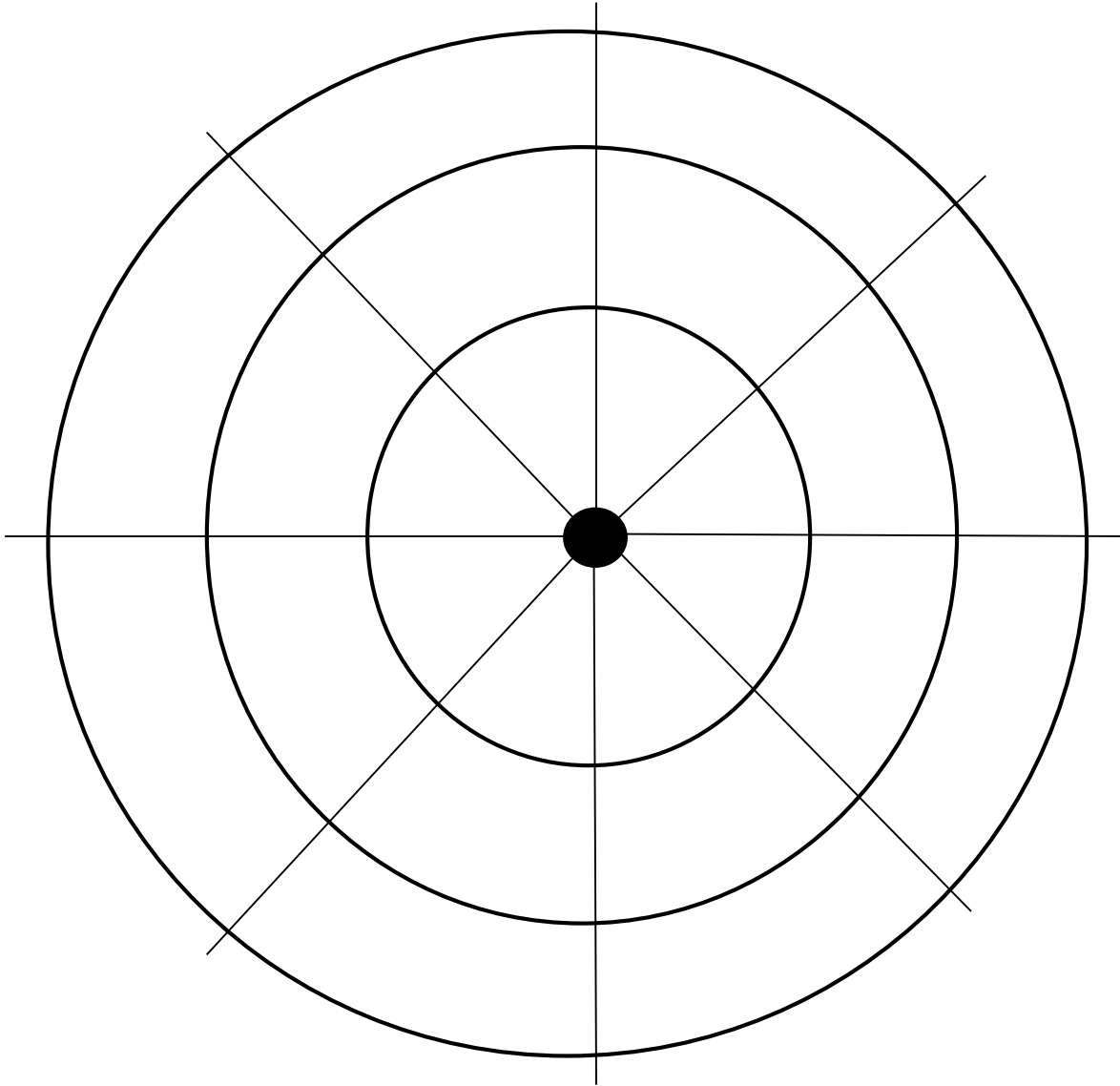


# Orbit Strategic Planning Tool

***Vision:***



# Orbit Strategic Planning Tool - Example

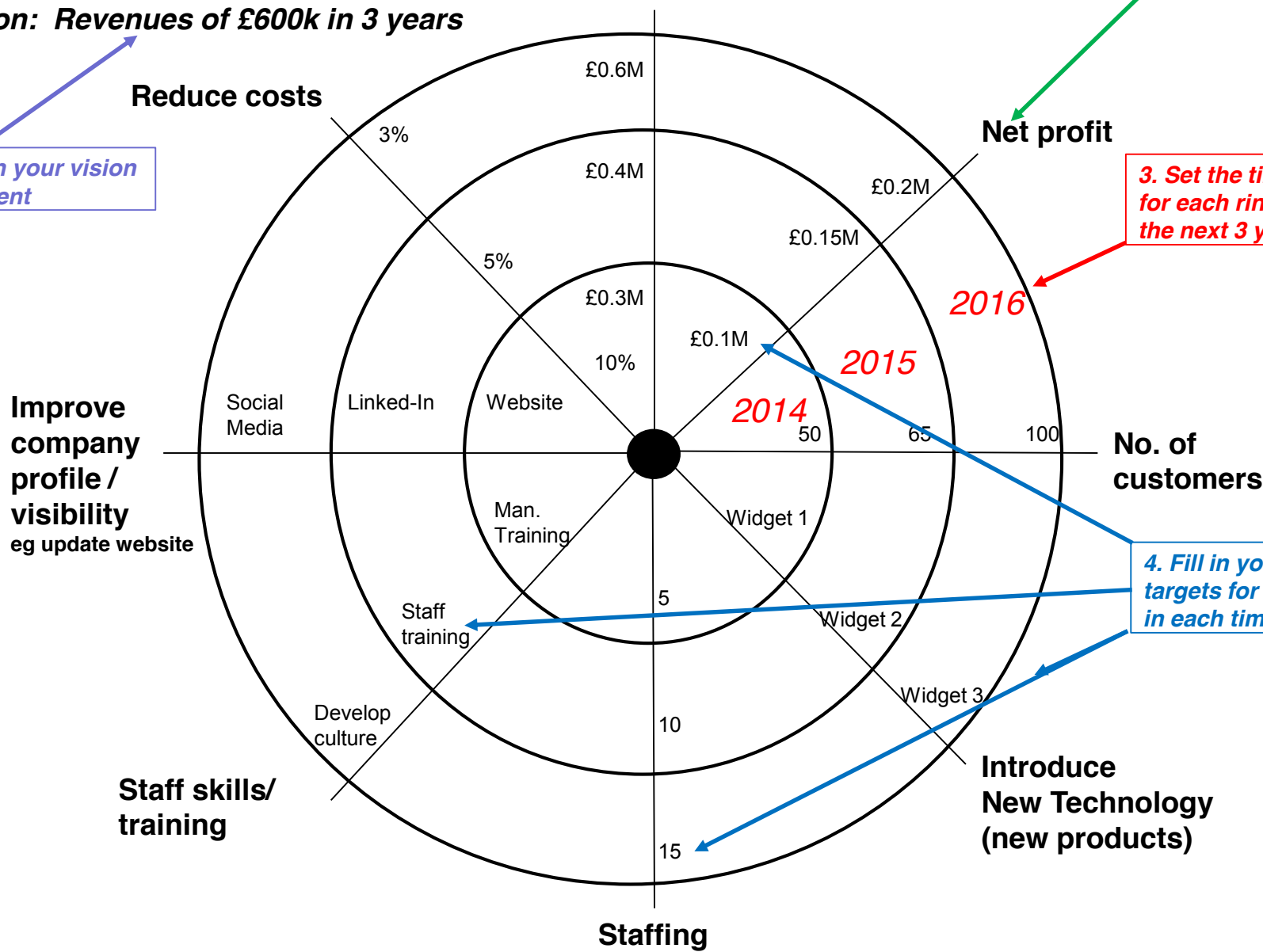
**Vision: Revenues of £600k in 3 years**

1. Fill in your vision statement

2. Label the radial lines with 8 key factors you want to track

3. Set the time period for each ring (normally the next 3 years)

4. Fill in your goals – targets for each factor in each time period





# My Breakthrough Plan

GOAL(S)	ACTION STEPS	DUE DATE	WHO	WHEN	BUDGET	MONITORING	S	M	A	R	T
<b>1. Generate £50K business from existing clients</b> <b>2. Identify 20 new prospects</b>	1 Ring round recent clients <i>from last 2 years</i> and check for follow-on opportunities	End Mar	Me	09:00-09:30 first thing each Wed and Fri morning (+ follow ups)	-	Review progress 1st working day of each month	✓	✓	✓	✓	✓
	2 Produce two-monthly newsletter to send to clients	End of Feb, Apr, Jun, Aug, Oct & Dec	Me & partners	Fri pm - 1 hr each wk for notes, 3 hrs every 2 mths to produce	-	Review progress 1st working day of each month	✓	?	✓	✓	✓
	3 Ask clients from the last 2 years for recommendations to their customers	End Mar	Me	09:00-09:30 first thing each Wed and Fri morning (+ follow ups)	-	Review progress 1st working day of each month	✓	✓	✓	✓	✓
	4 Buy list of potential prospects	End Apr	Me	Dedicate 2 x half day in Apr for research & purchase	-	Review progress Mon am during April	✓	✓	✓	?	✓
	5 Telemarketing to prospects to arrange 20 meetings	End May	Agency	from May	£5K	Progress reports from agency at end of each wk	✓	✓	?	✓	?
	6										

## Instructions

- Put in actions that will lead to your goals (use as many sheets as necessary)
- Think carefully to ensure that actions are SMART: Specific, Measurable, Achievable, Resourced & Timed
- Resourced: use the Who, When, Budget columns to note down who will do the action, when they will find time to do it and any cost
- Start with some simple short-term actions for each goal to make sure you gain momentum and confidence that you are moving forward
- Put ticks in the S,M,A,R,T columns when you are sure that the defined actions are Specific, Measurable, etc. Use “?” when the action still needs to be better defined