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

- Improve company profile / visibility eg update website
- Staff skills/ training
- Introduce New Technology (new products)
- Reduce costs
- Net profit
- No. of customers
- Social Media
- Linked-In
- Website
- Staff training
- Develop culture
- Man. Training
- Widget 1
- Widget 2
- Widget 3

Revenues
£0.6M
£0.4M
£0.2M
£0.15M
£0.1M
£0.3M
£0.0M

50 65 100
5 10 15

5% 3% 10%

MBF
07/01/14
# My Breakthrough Plan

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

1. Put in actions that will lead to your goals (use as many sheets as necessary)
2. Think carefully to ensure that actions are SMART: **Specific, Measurable, Achievable, Resourced & Timed**
3. 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
4. Start with some simple short-term actions for each goal to make sure you gain momentum and confidence that you are moving forward
5. 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