

# Future»»Proof ADVISORS

Inevitable Change»»Limitless Opportunity



# Strategic Initiatives Template

# Strategic»Initiatives

What »	Why »	How »	Future»Proof Point
<p>Strategic Initiatives are specific action items focused on achieving strategic priorities and overarching business goals.</p>	<p>Strategic initiatives are a great way to set yourself up for success through the creation of a detailed road map designed to achieve your goals.</p> <p>SI's also provide leadership with the ability to review and track projects &amp; progress easily.</p>	<ul style="list-style-type: none"> <li>▶ Revisit business goals &amp; strategic priorities.</li> <li>▶ Identify &amp; define the 3-5 actions (initiatives) that need to be accomplished to achieve your goals.</li> <li>▶ Create a plan to execute each initiative (milestones, tasks, deliverables, measures, accountabilities, timing).</li> <li>▶ Secure resources and budget for each initiative.</li> </ul>	<div data-bbox="2645 577 2812 772" data-label="Image"> </div> <p>Create a time frame of no more than 6-weeks for each strategic initiative. This will help make your plan much more manageable and set you up for greater success!</p>

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Specific action items focused on achieving strategic priorities and overarching business goals

Future»Proof Point

Business Objectives	Strategic Initiative	Milestones & Tasks	Key Deliverables
<p>Revisit your business objectives and include them here.</p> <p><i>Example: Expand customer base</i></p>	<p>Input strategic initiatives that align with your objectives here. For best results, include one SI per worksheet.</p> <p><i>Example: Discover market differentiation</i></p>	<p>Enter the milestone and activities needed to accomplish each strategic initiative here.</p> <p><i>Example: Create new value proposition (Milestone); Research customer (Task)</i></p>	<p>List the specific things that need to be delivered during or at the end of the project.</p> <p><i>Example: Customer Profile &amp; Persona Report</i></p>
Accountabilities	Resources	Measures	Timeline
<p>Include team members that are responsible for executing each initiative here.</p> <p><i>Example: Lead - CEO; Support - VP</i></p>	<p>List the necessary resources and budget needed to execute here.</p> <p><i>Example: Google Analytics; Social Listening / Cost = \$1,200</i></p>	<p>Outline KPIs or measures you will track here.</p> <p><i>Example: Sales; Engagement; Brand Loyalty Metrics</i></p>	<p>Put start &amp; end dates for each initiative here. We recommend each initiative take no longer than 6-weeks for completion.</p> <p><i>Example: Start: 10/01 - End: 11/12/2022</i></p>

# About Us



We are a **mid-market** and **emerging company advisory firm** founded by two pragmatic visionaries who have grown and scaled businesses from \$4M to \$200M+.

Our **Future Proof Advisors** have successfully transformed Inc. 500, private equity backed, and publicly traded companies into award winning, **highly profitable industry leaders** that realized multi-million dollar exits.

For more info, visit [www.FutureProofAdvisors.com](http://www.FutureProofAdvisors.com)

