

# Tactical Planning

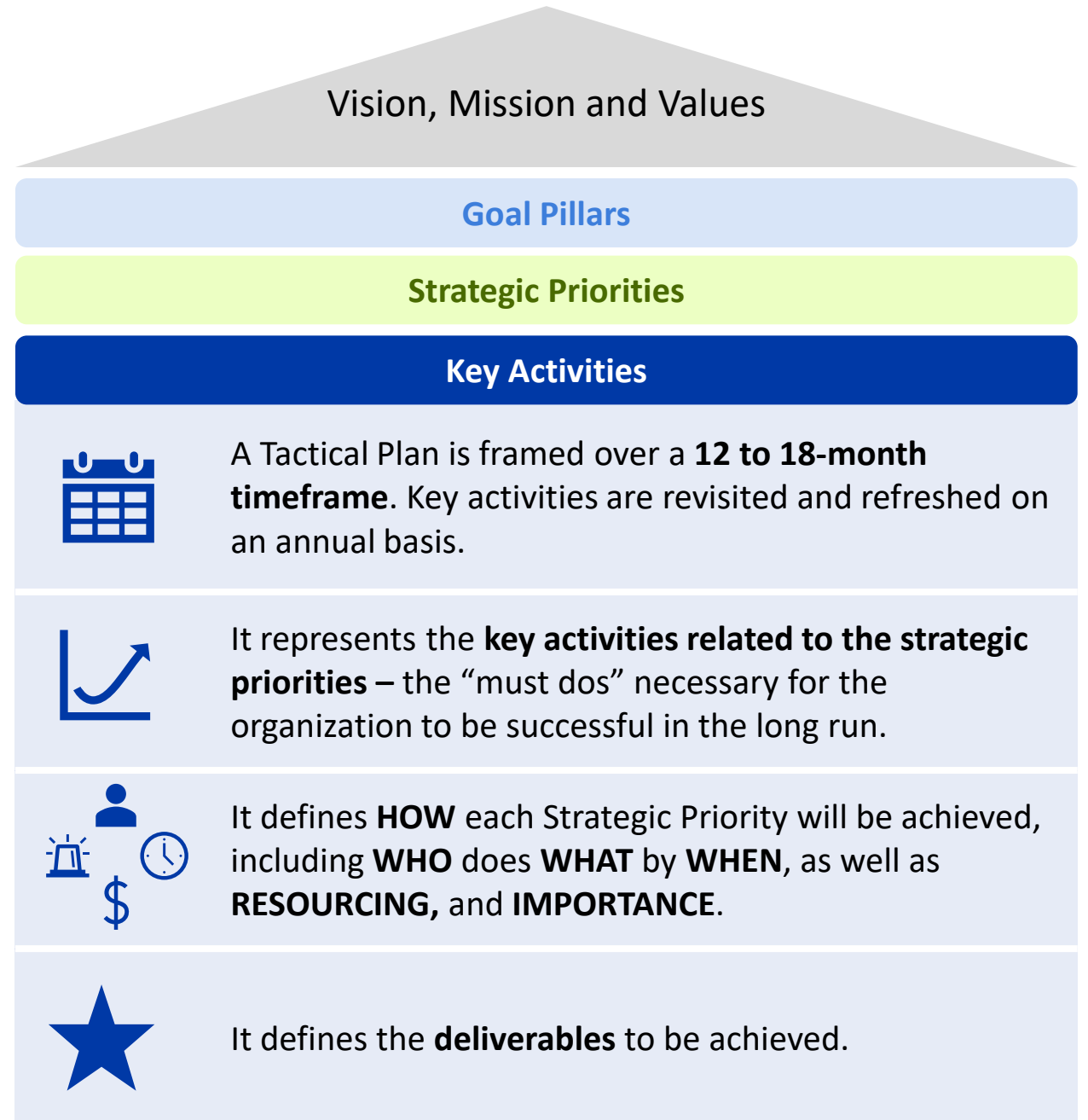
Tactical planning is the fourth critical step in our Strategy Development & Execution process. Simply put, it turns intention into action.

At Berlineaton, we’ve developed a tactical planning template that helps organizations identify and define the key activities required to achieve the goals and strategic priorities that underpin their vision, mission and values. Key activities are an essential part of defining how each strategic priority will be achieved, including who will do what by when, resourcing, and its importance. While strategic priorities can endure over many years, tactics in a tactical plan are typically refreshed every 12-18 months.

On slide 2, we provide the tactical planning template we’ve developed and used for 25 years. We use it with clients in Step 4 of our methodology, and it guides the development of reporting and monitoring tools. Take a look and try it out!

Learn more at [www.berlineaton.com](http://www.berlineaton.com)

Tactical Planning





# Tactical Planning Template

Below is a template to use for tactical planning that will help bring your organization's strategic plan to life.

**Goal:** From Strategic Framework

**Strategic Priority:** From Strategic Framework

Key Activity or Initiative	Key Actions	Owner	Completion Date	Importance (H/M/L)	Deliverable(s)	Budget Allocation
<p>What are the Key Activities or Initiatives that support the completion of the Strategic Priority?</p> <p>Start with a verb and describe such that it has a beginning and an end.</p>	<p>What are the <b>steps</b> required to complete the Key Activity?</p>	<p>Who has the <b>accountability</b> to deliver this Key Activity?</p>	<p><b>When</b> will the Key Activity be done?</p> <p>If there are major milestones (as noted in the Key Actions), note these and related dates.</p>	<p>What is the level of <b>importance</b> - High, Medium or Low, relative to others.</p>	<p>What <b>RESULT</b> will be achieved when the Key Activity is completed?</p>	<p>What is the level of <b>effort</b> required to complete?</p>