



# Tactical Planning Template

Strategic Framework	Definition	Examples
<p><b>Vision</b></p>	<p>A vivid description of a desired future that is a dramatic stretch from where an organization is today, written in a way that is clear, understandable and memorable. It describes your preferred future as an end state; <b>the destination</b>.</p>	<ul style="list-style-type: none"> <li>• Socially responsible students pursuing their passions for a better world.</li> <li>• Tomorrow's healthcare, today.</li> <li>• Engaged and inspired British Columbians for a better future.</li> </ul>
<p><b>Mission</b></p>	<p>An organization's <b>unique purpose</b>, what it does week in and week out, year in and year out, rather than where the organization would like to go or what it would like to be. It answers the questions: Why are we here? <b>What are we doing?</b></p>	<ul style="list-style-type: none"> <li>• To inspire and support young people for meaningful lives.</li> <li>• To realize enduring conservation benefits through investment in and delivery of initiatives that achieve productive natural landscapes and community wellbeing.</li> <li>• We provide the opportunity for individuals to have a voice in their future by creating personalized services that meet them where they are at.</li> </ul>
<p><b>Values</b></p>	<p>The beliefs that drive behaviours and are the ideas and principles that guide interactions with people both inside an outside an organization. They help an organization make decisions that are aligned with the organization's strategic intent.</p>	<ul style="list-style-type: none"> <li>• Joy and Grit.</li> <li>• We believe in character and doing the right thing.</li> <li>• We believe in Learning, Pluralism, Service, Community and Wellbeing.</li> </ul>
<p><b>Goal Pillars</b></p>	<p>Key results broadly defined in a 3-5-year period. They should be described as an end state in an area that is critical to the success of the mission and written aspirational.</p>	<ul style="list-style-type: none"> <li>• Strength and Permanence</li> <li>• Excellence in Teaching</li> <li>• A Strong and Healthy Community.</li> </ul>
<p><b>Strategic Priorities</b></p>	<p>A description of 8-12 key objectives that <b>MUST</b> be achieved for an organization to succeed and meet its vision. Strategic Priorities (sometimes called objectives) are the <b>'what'</b> that must be done and represent an effort that will have a significant impact on performance. They exclude tactical language such as striking committees, developing plans, etc.</p>	<ul style="list-style-type: none"> <li>• We must have facilities and technology that inspire innovation, collaboration, and transformative learning.</li> <li>• We must be an employer of choice, attracting and developing the best talent</li> <li>• We must commit to a thriving, joyful, inclusive, and diverse community of belonging and well-being.</li> </ul>
<p><b>Key Activities</b></p>	<p>The Key Activities (KA) or initiatives define <b>how</b> each strategic priority will be achieved, including timelines, accountabilities, milestones, and expected results. They represent what needs to change. They are action-based and start with a verb. They are framed in a 12-month period and revisited and refreshed on an annual basis.</p>	<ul style="list-style-type: none"> <li>• Redesign our approach to talent management.</li> <li>• Complete a Campus Master Plan.</li> <li>• Develop and implement a community engagement plan.</li> </ul>

# 3<sup>be</sup> Tactical Planning Template

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 the next page, we provide the tactical planning template we've developed and used for 25 years. We use it with clients in Step 4 of our Strategy Development & Execution 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

Vision, Mission and Values

Goal Pillars

Strategic Priorities

Key Activities



A Tactical Plan is framed over a **12 to 18-month timeframe**. Key activities are revisited and refreshed on an annual basis.



It represents the **key activities related to the strategic priorities** – the “must dos” necessary for the organization to be successful in the long run.



It defines **HOW** each Strategic Priority will be achieved, including **WHO** does **WHAT** by **WHEN**, as well as **RESOURCING**, and **IMPORTANCE**.



It defines the **deliverables** to be achieved.

# 3<sup>be</sup> 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>