The One Page Strategic Plan Program
(Quick Reference Guide)

What is it? A One Page Strategic Plan (OPP) is an alignment, focus and communication tool that engages a team, and or entire organization, around the top 3-5 priorities that are going to deliver the greatest impact on your performance and organizational health.

Who needs it? The OPP is for any team, and or organization, wanting to accelerate alignment, motivation, engagement, performance results & organizational health.

What are the results?

- 3x revenue growth impact within 1st year, and

- +10 - 30% profitability

- +30 - 50% productivity

- +40 - 70% employee engagement & accountability

- +30 - 50% customer success (net promoter score based)

How does it work? By literally getting everyone on the same page, the OPP becomes a shared common roadmap for short, mid and long-term success. It engages & rallies an entire organization around common priorities. Cascade planning bridges strategy & execution, with every part of the organization contributing through agreed tangible activities focused on specific business benefit.

The One Page Strategic Plan is the outcome of a one-day (or half-day for existing users) strategy session with key stakeholders from your organization. Those who have gone through this program manifest having greater clarity, focus, commitment, alignment, engagement, agility, motivation and simple practical tools required to achieve required performance, results & organizational health.

Comprised of the following three critical attributes, it's an agile framework that drives a strong company culture.

- **A Compass** that serves as a filter in your key decision making

- **A North Star** of your principle short, mid & long term priorities & objectives

- **A Roadmap & rudder** that include accountability, tangible activities focused on specific business benefits.

The Compass

Mission, Vision & Core Values: An Aspirational Conversation **(Level 0)**.

The OPP is read left-right & executed right-left. Starting at an aspirational (strategic) level, level 0 is the first filter to be applied toward any decisions, action plans, product development, services rendered, etc.

The key is not to prioritize what's on your schedule, but to schedule your priorities. - Stephen Covey

Vision without action is merely a dream. Action without vision merely passes the time. Vision with action can change the world. – Joel Barker

The OPP framework is principally derived from the following universal best practices that have lived the test of time.

- Balanced Scorecard
- Strategic Execution Framework (INVEST Model)
- Agile Manifesto
- Cascade Planning
- Reverse Hierarchy

North Star

Long-Term Top 5 Priorities: A Strategic Conversation **(Level 1)**.

The OPP works because we gradually bridge aspiration to strategy before we start getting down to tactics. This building block and incrementally tangible process helps everyone in an organization understand and rally around the same core beliefs & requirements to deliver the expected performance & organizational health.

From the various exercises run during a Strategy-in-a-Day workshop, the Top 5 long-term priorities serve as a North Star (guiding light) for everything else to come afterward. The Top 5 are a consequence a simplified SWOT analysis called a D.O.S. Conversation.

In order to effectively bridge aspiration to strategy and then build a tactical plan, each subsequent "level" must incrementally become more tangible. At level 1, in addition to creating tangible criteria of business benefit for each priority, our Top 5 Priorities must also contribute toward our first set of topline Objectives & Key Results (OKR's).

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The Roadmap

Mid & Short-Term Long-Term Top 5: Bridging Strategy to Execution **(Level 2)**

Having identified where we want the organization to be with 2-3 years, we must now focus on what's within our control in the mid to short-term building blocks for our future success. What will we need to focus on in the next 12 months in order to align with our long-term priorities, objectives & key results?

Subsequently, what will we have to focus on during the next 90 days that will align & serve our mid-term priorities, objectives & key results? And what are the opportunities, should they manifest, that could accelerate our plans & performance? Likewise, what are the threats that could impede ours plans & performance?

It's at this stage that rhythm & agility become key to success. When revising our 90 day plans on a quarterly basis, we should look out to the 12 month plan & consider what, if anything, has change in our ecosystem that needs to be taken into consideration for subsequent revision of our annual plan. Studies show that 90% of the opportunities & threats that effected strategic plans were there all along, but simply weren't at the forefront of regular / routine (rhythmic) planning & execution.

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The Contribution

Cascade Planning: Top-down Communication & Bottom-up Execution **(Level 3)**,

No man is an island and you can't get scale unless everyone is on the same page as to how they contribute to the overall success of the company, topline performance results & organizational health. Level 3 is the most critical step of cascade planning as it gives each contributing business unit the specific short term focus they'll need in order for the entire organization to succeed.

In Executing Your Strategy, Harvard Business Press states that 70-90% of all effective strategies "on paper" fail to poor engagement models. Breaking down the engagement model of how each business unit, and or individual, contributes to overall success & topline performance is indeed the most critical step to achieving scalable & sustainable success.

It's from level 3 that individual & group tactical plans (Level 4) are derived.
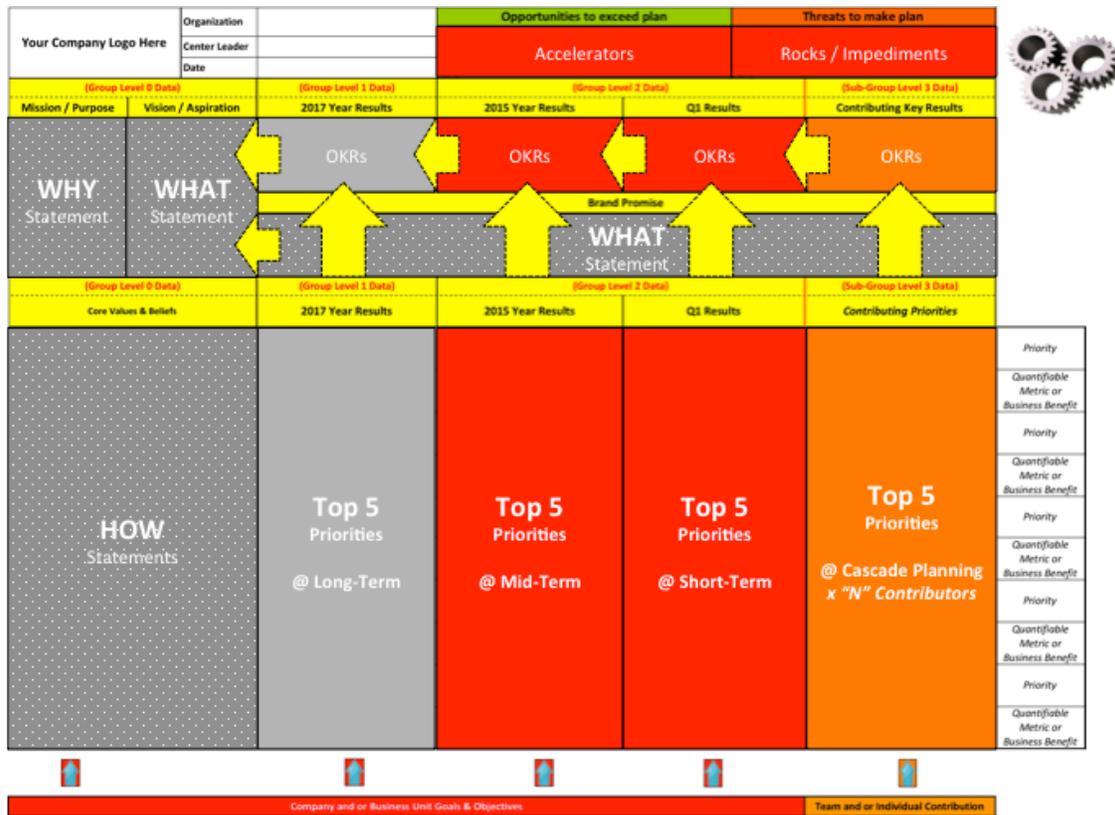

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How It All Comes Together

As stated in the beginning of this document, the One Page Strategic Plan is read left-righ & executed right-left. It's reverse hierarchy methodology is one of the secret ingredients to success. The logic & order of the agenda of a Strategic One-Day workshop follows the same emotional intelligence principles layered into the One Page Stratgic Plan.

In order to nail execution and get the individual & collective performance, results & organizational health you require to succeed, there are indeed other layers of operational excellence to stack as the complexity of an organization grows in size & stage. That said, these are the building blocks upon which scale & success is built upon.

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About JC

For more than 30 years, [JC Duarte](#) has worked IN-the-business operationalizing Go-to-Market & Customer Success strategies so that CEO's can focus ON-the-business.

JC's sweet spot are companies that have gained product traction, typically with current revenues north of 10-20M, and or seeking internationalization.

Trilingual, not only for his fluency of English, Portuguese & Spanish, JC's start-up, fast-growth mid-sized & corporate experience across 5 continents give him a unique understanding of applicable relevance to any situation encountered.

An energetic and team focused C-level executive with extensive experience scaling organizations through key business inflection points, JC develops scalable high performance cultures & organizational health through effective knowledge transfer.

Past VP level roles reporting to the CEO:

- Chief Operations Officer
- Chief Customer Success (Services) Officer
- Chief Technology Officer
- Director of Portfolio Management Office

Call to Action:

Are you currently achieving?

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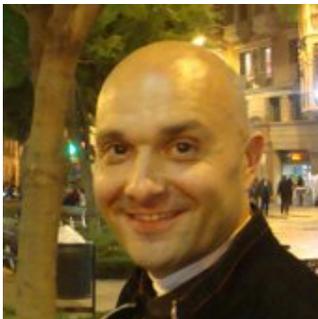
Call or [email JC](#) to request a **complimentary 1h discovery session** that will immediately get you started on the right track.

T. +1 415-954-2677
E. jc@jcduarte.com