

# CIRCLE OF GROWTH STRATEGIC PLAN

## Vision

- What is our long-term aspiration?
- Where do we see ourselves in 5-10 years?
- What impact do we want to make on the world?

## Values

- What principles guide our decisions?
- What is most important to us as an organization?
- What behaviors do we want to encourage?

## Mission

- What is our core purpose?
- What problem are we solving?
- How do we create value for our customers/stakeholders?

This reflection board is designed to help align your team around a shared vision, values, and mission. Use the prompts in each section to facilitate thoughtful discussions and create a clear, actionable plan for the future.

## Core Values

List 3–7 fundamental core values that define who we are as an organization. Each value should reflect expected behaviors and guide daily decisions.

For each value, identify:

- **Definition:** What the value means in practice.
- **Key Behaviors:** 1–2 observable actions that demonstrate the value.

## Guiding Prompts:

- Which values are consistently modeled today?
- Which values need clearer reinforcement across the team?

## Core Focus

**Define the organization's Core Focus through two components:**

- **Purpose/Cause/Passion (The Why):** Clarify why the organization exists – its core purpose or driving passion.
- **Niche (The What):** Identify what the organization does better than anyone else – the niche or unique specialty that sets it apart.

Keeping a clear focus helps the team stay centered on what matters most.

## Marketing Strategy

**Ideal Target Market:** Describe the profile of your ideal customer or market segment.

**3 Uniques:** List three distinguishing qualities or differentiators that set your organization apart from competitors.

**Proven Process:** Outline the core process or journey you take clients through to deliver your product or service consistently.

**Guarantee:** Specify any promise or guarantee you offer (if applicable) to reduce customer risk and build trust.

## 1-Year Plan

Identify up to five specific, measurable goals to accomplish in the current year. These are the major objectives that must be achieved by year-end, each with a clear metric or outcome, to move the organization toward the 3-Year Picture.

## 3-Year Picture

Outline a clear vision of where the business will be in three years. Include specific targets (such as revenue, profit, team size, and other key metrics) that define success at that point. Alongside these numbers, provide a brief description of what the company looks like then – for example, what major capabilities have been developed and how the organization operates at that stage

## Quarterly Goals

List the 3–7 top company priorities (“Rocks”) for this quarter. Each Rock should be clearly defined and include a specific metric or target to measure its completion by the end of the quarter.

## Issues List

Capture any key long-term issues, challenges, or opportunities that need to be addressed for the organization’s growth. This running list helps the leadership team keep track of major obstacles to resolve over time, separate from day-to-day operational issues.

## Who You Are (Traits)

Identify the core leadership traits that define how the organization thinks, responds, and operates internally. These traits reflect the character and posture expected across the team.

## What You Do (Actions)

List the key actions that translate those traits into consistent execution. These actions represent the outward behaviors the organization commits to practicing daily.