



# 30-DAY, 90-DAY, 1 YEAR COVID-19 RESTART

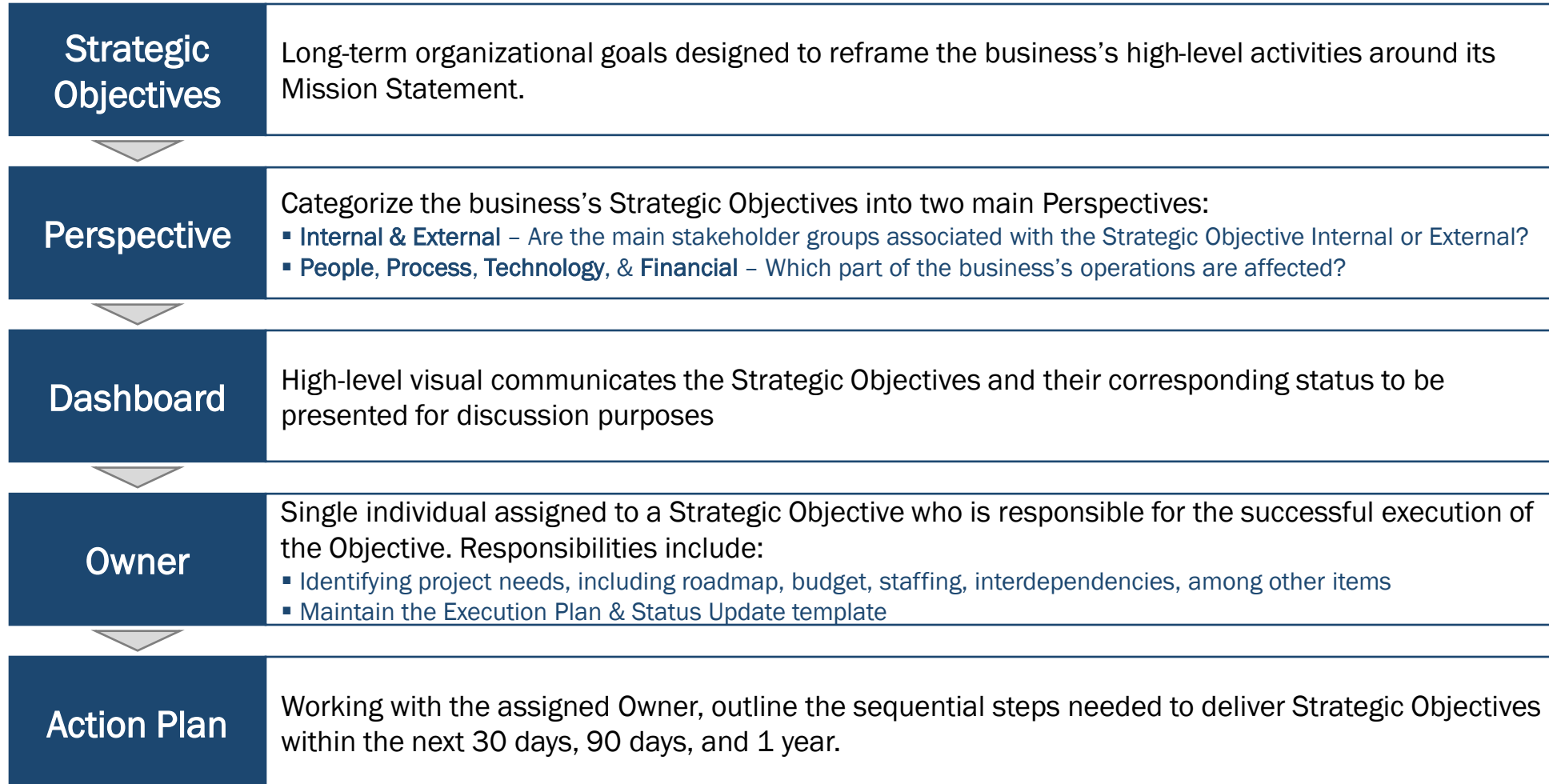
**Strategic and Tactical Action Planning  
Process and Templates**

Created by [Shields Legal Group](#)

# Definitions

Refer to this page for terms used throughout this document

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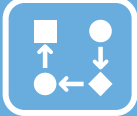



# Strategic Planning Overview

Begin post-COVID planning and enable your organization to restart in a stronger position

| Purpose of this Exercise  | Goals of this Document                                      |
|---|---|
| Set Strategic Objectives for your COVID Restart                 | Explain how to use this Strategic Planning framework        |
| Assign Owners to Strategic Objectives and Hold Them Accountable | Implement a governance structure for execution transparency |
| Organize and Document the Plan for Future Reference             | Provide templates and best practices                        |

## Best Practices

|   |   |  |  |
|---|---|--|--|
| <br>Assign a Single Owner to each Strategic Objective | <br>Revisit Owner Assignments if they do not Deliver Results | <br>Identify & Communicate Interdependencies within Strategic Objectives | <br>Update this Document as Needed |
|---|---|--|--|

# Run the Framework Through a Process

These three templates, used in sequence, help organize ideas and convert them to action

**Legend**

Template Name | Stakeholder Group | Cadence

- Description

**Strategic Objective Dashboard**  
During an unconstrained ideation session, list Strategic Objectives and categorize them by type

| Perspective | Strategic Objectives |              |              |              |
|-------------|----------------------|--------------|--------------|--------------|
|             | Internal             |              | External     |              |
| People      | Objective 1          | Objective 2  | Objective 3  | Objective 4  |
| Process     | Objective 5          | Objective 6  | Objective 7  | Objective 8  |
| Technology  | Objective 9          | Objective 10 | Objective 11 | Objective 12 |
| Financial   | Objective 13         | Objective 14 | Objective 15 | Objective 16 |

## Strategic Objective Dashboard | Leadership | Quarterly Refresh

- Start with a brainstorming session as a Leadership Team, list all **Strategic Objectives** that arise during the session
- Bucket each idea into the **Perspectives** framework provided on the Strategic Objectives Dashboard
  - Ideas should not cross Perspectives; not every Perspective needs an Objective, but all Objectives need a Perspective
- Rank the ideas and reduce to 8-16 priority Objectives.
- As Objectives begin, use this template as a **Dashboard** for quick check-ins on initiative status

## Monthly Refresh | Leadership & Management | Roadmap & Action Planning

- Include each prioritized Objective as its own line in the template based on its **Perspective**
- Assign a single point of contact, an **Owner**, to each Objective. This person will be held accountable for delivering results, managing milestones, and reporting status updates on a weekly basis
- Work with each Owner to align on an **Action Plan** for three time periods: 30-day, 90-day, and 1-year

**Roadmap & Action Planning (People and Process)**  
Assign Owners and Tactical Action Items to each Objective and socialize with your team

| Strategic Objectives | Objective Owner | Start Date | Status | Action Plan |           |           |
|----------------------|-----------------|------------|--------|-------------|-----------|-----------|
|                      |                 |            |        | 30-Day      | 90-Day    | 1-Year    |
| Objective 1          | Owner 1         |            |        | Action 1    | Action 2  | Action 3  |
| Objective 2          | Owner 2         |            |        | Action 4    | Action 5  | Action 6  |
| Objective 3          | Owner 3         |            |        | Action 7    | Action 8  | Action 9  |
| Objective 4          | Owner 4         |            |        | Action 10   | Action 11 | Action 12 |
| Objective 5          | Owner 5         |            |        | Action 13   | Action 14 | Action 15 |
| Objective 6          | Owner 6         |            |        | Action 16   | Action 17 | Action 18 |
| Objective 7          | Owner 7         |            |        | Action 19   | Action 20 | Action 21 |
| Objective 8          | Owner 8         |            |        | Action 22   | Action 23 | Action 24 |

**Execution Plan & Status Update**  
Plan and socialize tactical activities, interdependencies, and risks/mitigation strategies

| Objective Overview   | Dependencies & Scope     | Key Milestones/Status | Critical Activities/Status |
|--|--------------------------|-----------------------|----------------------------|
| Objective Name: [Insert Name]   Start Date: [PENDING]   Objective Owner: [Person, Process, etc.]   Initiative Status: [On Track, etc.]   Completion Date: [PENDING]   Objective Focus: [Strategic, Tactical] | Dependencies and Scope   | Key Milestones/Status | Critical Activities/Status |
| Key Accomplishments  | Risks & Mitigation Plans |                       |                            |

## Execution Plan & Status Update | Strategic Objective Owners | Weekly Updates

- These detailed pages should be created and maintained by each Strategic Objective **Owner**
- This should be submitted and reviewed on a periodic basis (recommended weekly) to Leadership & Management as a standard way to communicate successes, roadblocks, and ongoing activities
- This page is, in many ways, a living Project Charter



# **BLANK TEMPLATES FOR USE**

# Strategic Objective Dashboard

During an ideation session, list Strategic Objectives and categorize them by Perspective

| Perspective | <u>Strategic Objectives</u> |              |              |              |
|-------------|-----------------------------|--------------|--------------|--------------|
|             | Internal                    |              | External     |              |
| People      | Objective 1                 | Objective 2  | Objective 3  | Objective 4  |
| Process     | Objective 5                 | Objective 6  | Objective 7  | Objective 8  |
| Technology  | Objective 9                 | Objective 10 | Objective 11 | Objective 12 |
| Financial   | Objective 13                | Objective 14 | Objective 15 | Objective 16 |

**Status Legend**

- On Track
- At Risk
- Off Track
- On Hold

# Roadmap & Action Planning (People and Process)

Assign Owners and Tactical Action Items to each Objective and socialize with your team

|                      |                 |            |        | Action Plan  |  |  |
|----------------------|-----------------|------------|--------|--|--|--|
| Strategic Objectives | Objective Owner | Start Date | Status | 30-Day   | 90-Day   | 1-Year   |
| <b>People</b>        | Objective 1     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 2     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 3     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 4     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
| <b>Process</b>       | Objective 5     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 6     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 7     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 8     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |

**Status Legend**

- On Track
- At Risk
- Off Track
- On Hold

# Roadmap & Action Planning (Technology & Capital)

Assign Owners and Tactical Action Items to each Objective and socialize with your team

|                      |                 |            |        | Action Plan  |  |  |
|----------------------|-----------------|------------|--------|--|--|--|
| Strategic Objectives | Objective Owner | Start Date | Status | 30-Day   | 90-Day   | 1-Year   |
| <b>Technology</b>    | Objective 9     |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 10    |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 11    |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 12    |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
| <b>Capital</b>       | Objective 13    |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 14    |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 15    |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |
|                      | Objective 16    |            |        | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> | <ul style="list-style-type: none"> <li>▪ Action 1</li> <li>▪ Action 2</li> </ul> |



# Execution Plan & Status Update

Plan and communicate tactical activities, interdependencies, and risks/mitigation strategies

**Status Legend**

|   |   |  |   |
|---|---|--|---|
| <span style="color: green;">■</span> On Track | <span style="color: yellow;">■</span> At Risk | <span style="color: red;">■</span> Off Track | <span style="color: gray;">■</span> On Hold |
|---|---|--|---|

|                           |  |  |  |
|---------------------------|--|--|--|
| <b>Objective Overview</b> | Initiative Owner: <input type="text" value="[Insert Name]"/>     | Start Date: <input type="text" value="[FYxxQx]"/>      | Objective Bucket: <input type="text" value="[People, Process, etc.]"/> |
|                           | Initiative Status: <input type="text" value="[On Track, etc.]"/> | Completion Date: <input type="text" value="[FYxxQx]"/> | Objective Focus: <input type="text" value="[Internal, External]"/>     |

| Detailed Description & Scope   | Key Discussion Topics   | Critical Activities <i>(next 2 weeks)</i> | Status                                |
|--|---|---|---------------------------------------|
| <ul style="list-style-type: none"><li>[Insert a brief description and scope of the initiative]</li></ul> | <ul style="list-style-type: none"><li>[Insert Key Discussion Topics for the week]</li></ul> | Activity 1                                | <span style="color: green;">■</span>  |
|  |   | Activity 2                                | <span style="color: yellow;">■</span> |
|  |   | Activity 3                                | <span style="color: red;">■</span>    |
|  |   | Activity 4                                | <span style="color: gray;">■</span>   |
|  |   | Activity 5                                | <span style="color: green;">■</span>  |
|  |   | Activity 6                                | <span style="color: green;">■</span>  |

| Key Accomplishments   |
|---|
| <ul style="list-style-type: none"><li>[Insert Key Accomplishments since the last time the group convened]</li></ul> |

| Risks & Mitigation Plans   |
|--|
| <ul style="list-style-type: none"><li>[Insert Risks and Mitigations]</li></ul> |