



Executive Strategic Planner

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Undated Leadership Edition



ETHICAL GUARDRAILS + IMPACT BEYOND REVENUE

Define the lines you will not cross, and the legacy you intend to build.

- Ethical Guardrails (3-5 non-negotiables):

- 1. We will not _____

- 2. We will not _____

- 3. We will not _____

- 4. We will always _____

- 5. We will always _____

- Impact Beyond Revenue:

- Who benefits because we exist? _____

- What measurable good will we create this year? _____

- What standard of care will define our leadership? _____

- Community/Industry Contribution Goals (Top 3):

- 1. _____
- 2. _____
- 3. _____

Profit is a result. Stewardship is the assignment.





QUARTERLY CALENDAR PAGE

Translate annual direction into focused 90-day execution.

- Quarter: Q1 / Q2 / Q3 / Q4

- Quarter Focus Theme: _____

- Quarter Revenue Target: _____

- Top 3 Strategic Outcomes:

1. _____
2. _____
3. _____

- Major Initiatives Timeline:

- Initiative: _____ Owner: _____

Start: _____ Due: _____

- Initiative: _____ Owner: _____

Start: _____ Due: _____

- Initiative: _____ Owner: _____

Start: _____ Due: _____

- Quarter Review Notes:

- Wins: _____

- Gaps: _____

- Adjustments for next quarter: _____





MONTHLY STRATEGIC CALENDAR (Undated)

Month: _____ Year: _____

Sunday

Monday

Tuesday

Wednesday

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Weekly Planner _____ *Wk #* _____

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

Notes:

