

Strategy (MOST) Worksheet

Discuss as a Team:

- **Mission/Vision** – the organization’s purpose and reason for being.
- **Objectives** – qualitative statements describing what the business is trying to achieve.
- **Goals** – represent how success will be quantitatively measured for each objective. Stephen Covey suggested that goals should be worded as “from x to y by z”.
- **Strategies** – what the business will do (the main actions or projects) to achieve the objectives.
- **Tactics** – specific actions needed to accomplish each strategy.



Mission:
To be the number one Benefits insurance brokerage in our market offering products and high value-added services.

Objective 1:
Growth: Be the largest high value-added agency

Increase revenues by 40% in 4 years

Goal:

S_{strategy 1} Hire producers

Tactic 1:
Tactic 2:
Tactic 3:
S_{strategy 2} Advertise agency

Objective 2:
Services: Set the standard in service levels that exceed expectations

Lead expectations by at least 1 point at all times

Goal:

S_{strategy 1} Invest in Service Platform

Tactic 1:
Tactic 2:
Tactic 3:
S_{strategy 2} Emphasize Value-Validation to enhance revenues

Objective 3:
Employer of Choice: Share the success & retain talent

Attrition < 10%

Goal:

S_{strategy 1} Share the success

Tactic 1:
Tactic 2:
Tactic 3:
S_{strategy 2} Select and develop top talent