



PIVOT

E-LEARNING SERIES

WORKBOOK



STRATEGIC PLANNING

2

DIRECTION WHERE WE ARE GOING?

- Mission Statement
- Vision Statement
- Market Influences



MISSION AND VISION STATEMENT WORKSHEET | 30 MINUTES

These business drivers set the groundwork for your marketing, influencing all of your goals and strategies moving forward. They are something you need to maintain throughout the life-cycle of your business as you never want to stagnate. If you need to adjust these you can do so as required, look at them at least once a year. Remember these may also fundamentally shift if you change your business model, but they should not shift much with a change in how you do business. Essentially, if you used to be a brick and mortar shop but moved to online, only slightly changes will need to be made to your mission but quite substantially to your values. On the other hand, if you go from a product driven business to a service based one, you will see a significant refocusing in both areas.



SUCCESS

can sometimes
be a result of simply
using the perfect word

Need some inspiring examples?
<https://blog.hubspot.com/marketing/inspiring-company-mission-statements>

- A** Complete the **mission** exercise below. This statement is the **cause** that drives you (can also encapsulate your principals) to identify the what and why questions customers have.

PURPOSE

MISSION

ANSWER THE BIG QUESTION:
Why is your business in business?

Ask yourself:

What purpose do you fill?

What do you stand for?

What value do you add?

How do you pursue this?

What makes you keep going?

THESE ARE YOUR **CURRENT**
BUSINESS STANDARDS

BRAINSTORM:

STATEMENT:

- B** Complete the **vision** exercise below. Remember your statement is about the **effect** your mission has, making this statement all about where you aspire to be when that happens.

ASPIRATION

VISION

ANSWER THE BIG QUESTION:
What do you want to be known for?

What do you want to accomplish?

What are your aspirations?

How do you achieve these ?

What is your core driver?

What is your overall goal?

Where do you want to go?

THIS IS YOUR **FUTURE**
BUSINESS DIRECTION/ASPIRATION

BRAINSTORM:

STATEMENT:
