# Creative Strategic Plan Template

This template outlines each section of a Strategic Plan and explains what it could contain. Feel free to delete sections or skip sections until later. Don’t be intimidated by the size of this document. When you delete all of my writing, it’s actually streamlined. It can be as big or as little as you want, as complex or as simple.

How to use this document: This document has been created using Styles in Word. If you are using Word, which I recommend, there is a feature called Navigation Pane, which you should be able to find under ‘View’ and ‘Sidebar’ and then ‘Navigation.’ Depending on the version of Word you’re using, this might be called something different. When you click on navigation, a sidebar will pop up with all of the sections in this document, so you can navigate it easily. If you want to put in a new section, be sure to use Styles. I’m not going to explain Styles, but you can google it if you want to.

The Table of Contents on the next page can be updated by right-clicking and choosing ‘update field’ and then ‘update entire table.’

Now delete this page and start creating your plan!

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# Executive Summary

The introduction or Executive Summary as it's often called is a place to get very flattering and aspirational. In a creative strategic plan, this is where you would put:

* What the project is (name, genre, etc.). Think logline or pitch
* The major goal you’re working towards (publishing, for example)
* Very brief summary of the audience or market for your project
* Some high-level opportunities/activities you’re pursuing to achieve your goal
* Indicators of success

Often you will write some or all of this executive summary after you’ve written the plan or after you’re well into it. You want this opening to your Plan to be a very inspiring and positive, so put a good spin on it. Make it something that you can read when you feel down.

Now delete this description and write your own!

# Project Overview

## Goal

Setting a major goal for your project, or a few goals is a way to be inspired and keep on track when you lose motivation.

## Vision

What is the vision of your book or project? It could be something simple, such as "To entertain the reader" but you'll get more mileage out of your plan if you come up with something aspirational, something that really captures what you hope your reader will experience. You have to put yourself into your audience's shoes and really think about how you want them to feel while they read your book, and after they've read it. Examples:

* To take my readers on a wild ride through the Amazon rain forest
* To expose the injustice in our legal system
* To capture the difficulties of growing up in a \_\_\_\_\_\_ family
* To bring hope to heart-broken people

These are kind of cliché and generic. Come up with your own vision that inspires you.

## Mission

The mission is how you plan to achieve your vision. You can skip this if you don't have a clear idea, but for example, here are missions to accompany the generic visions listed above:

* I will balance my vivid descriptions of the Amazon with an insanely fast action plot
* I will have a hyper-realistic and accurate court setting and avoid stereotypes at all cost
* I will be brutally honest and spare no one in my family
* I will create vibrant, quirky main characters who have real problems

## Key Messages

Now the key messages are something you can skip, but a great option for this section could be to include the story blurb, log line, one-sentence character lines. This is basically the components of a query letter. Really amp yourself here and try to pull out the very best in what you're doing. Sell your characters and your story to yourself.

# Research

This section can easily get out of hand, and I highly recommend that you create Research Appendices (at the end of the Strategic Plan), and keep only the more high-level aspirational content in this section, a basic outline of the research that you've done and what is most exciting to you. This is to keep the document flowing, organized and compact, which will make it more useful to you. Whatever you write in this research section, ensure that you are really digging deep about what makes each part unique and special.

To make your document as useful as possible, I do recommend capturing the hyperlinks to your online research sources.

A few sentences to a paragraph about each of the following sections:

## Audience

Your audience and what you know about them

## Market

The market and what you know about it

## Characters

List each main character and sell us on them. Really bring out what makes them unique and special. You're trying to distill their essence

## Setting

Give us the most interesting information about your setting. What are its real selling features?

## Plot

You could give a high-level summary here

## Agents/editors or anything else you’ve done research on…

Anything else that is particular to your novel or creative project.

# Strategy

Here is where we get into the real meat and potatoes of the Strategic Plan. This is what clients pay the big bucks for--they want to know what they should DO. Unfortunately, you don't have someone explaining what to do, but at least you have the methods contained here to make a plan for yourself.

## Resource Audit

This is a personal fave. This is your opportunity to look at all aspects of your life and the project, and really try to think about anything that could help you accomplish your goals. This could be facets of your personality, such as your tenacity, or it might be to contacts you might have, such as a writing group, or skills, such as surfing, boxing or a degree in biology, or whatnot. This is your opportunity to think about what makes YOU and YOUR life exactly right for this story.

The audit also gives you an opportunity to mine for whatever you can leverage to make your project more successful. This is your opportunity to really shine a loving light into every area of your life.

## SWOT Analysis

|  |  |
| --- | --- |
| Internal Strengths | Internal Weaknesses |
| External Opportunities | External Threats (barriers) |

A SWOT is a technique to outline the Strengths, Weaknesses, Opportunities and Threats of a company or project. This is not meant to be an emotional experience. This is meant to be a very detached, objective view of the situation. The main thing to keep in mind while doing a SWOT is your goal. Your vision. Your mission.

The strengths will come mainly from your resource audit, but just streamline them.

Weaknesses are just what they sound like, but for every weakness that you come up with, try to find a correlating strength. For example, a weakness is that you have poor grammar skills, which is an issue that a lot of writers struggle with. What is a strength you DO have that counteracts poor grammar? For example, you might have money for an editor. Or you have a tenacity to learn. Or you have Grammarly! The point here is that as writers, as creatives, we often get stuck in what's not working, our weaknesses, and we don't want this SWOT activity to be depressing, so YES, you should be honest and list your weaknesses, but also focus on strengths that counteract weakness.

Opportunities and Threats are outwardly focused, rather than inwardly. Think about the market, the audience, the climate, the state of affairs in the industry, etc. Start with listing as many opportunities as you can. These can be things like a writing group or the topic of your novel is timely, or you happen to know an agent.

Once you're done that, start listing your threats. These are things that are barriers to your success. A common 'threat' for traditional publishing is the difficulties in finding an agent. They really are difficult to acquire. So what is an opportunity that counteracts that threat? It could be attending conferences so you can pitch your story, or it could be self-publishing, or... on and on. List at least one opportunity to counteract each threat.

## Key Objectives

Here you want to create a tailored list of 3-6 (or so) objectives. These are specific, measurable (you know when you're done) goals that will help you achieve your larger overall goal. Think about the SWOT and what you uncovered.

Examples of Key Objectives:

* Finish a rough draft (or second)
* Polish your manuscript
* Rewrite your manuscript
* Find an agent
* Get your MS published
* Promote your novel

One way to determine objectives is to list your biggest challenges, and the objective is the thing that will help you overcome that challenge.

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| **Challenge** | **What does success look like?** | **Objective** | **Measuring success** |
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## Strategies & Tactics

Strategies are like what they sound—they are boots on the ground ways of making it to your goal. So for example, networking is a strategy for finding an agent. A strategy for finishing a rough draft might be to take a month off work, or perhaps join Nanowrimo. A strategy for polishing your MS might be to enlist your friends and family or hire an editor. A strategy for promoting your creative project might be to start using social media or use online advertising.

Tactics are more pin-pointed. Once you've decided to start using social media to promote your work, you should then make some tactical decisions about what that's going to look like. What social media sites exactly will you sign up for? How will you build a following on them? What tactics will you use to make people want to follow you on Booktok?

The idea is to get creative, be open-minded. Think outside of the box. This is the perfect topic to ask about in a writing group. Tell people your key objective, and then ask them what type of strategies they can recommend to achieve that goal.

For each objective, it would be great if you can come up with a few strategies. Does this mean you need to DO all of those strategies? No, but you should keep them in mind. And review what you're doing. Sometimes we're just spinning our wheels, doing things that won't actually help us reach our goals.

Don't worry if you don't have any strategies or tactics for one of your key objectives. This is a living document. It's meant to be a place to capture what you learn along the way. Say you go to a conference and you learn about social media and you realize THIS is what you want to do--this social media site is the one you want to use. Then you can come back to this document and capture that information here.

You could also make an appendix for this area of the Strategic Plan as well, just so that your document remains compact and easy to use. You could have a social media appendix, for example. Or an agent appendix.

Here is a table to use, though feel free to delete it if it’s stress-inducing. You can also just summarize the strategies and tactics here, and then put more effort into creating an EXCEL timeline/schedule, which I’ve included in the resources on my website.

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|  | **Strategy** | **Tactic** |
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| 1.3 |  |
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| Objective 2  | 2.1 |  |
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| Objective 3 | 3.1 |  |
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| Objective 4 | 4.1 |  |
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| Objective 5 | 5.1 |  |
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# Action Plan and Implementation Chart

In my experience, in a creative project, it doesn't make too much sense to put a lot of time or effort into creating a timeline. As creatives, we're often doing something we haven't done before, and as humans, we commonly underestimate how much time something is going to take. Especially if you might get discouraged, don't bother putting a lot of detail into your timeline. Here is a simple one that you can use. Or delete!

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However, if you are someone who relishes being organized, a detailed schedule or timeline can be great, and it's a great way to see all of the activities and plans you have in one birds-eye view place. Our clients were always relieved to see our schedule, and you could sense that they were like, "Ahh... okay all this money and work paid off. We have a plan."

Here is a free Excel timeline/schedule that you can feel free to use or adapt that we used at my work all the time.

Having offered that, I do think it's best if the timeline you create is structured in a way that it doesn't become obsolete when one thing falls behind. There are so many great project management timeline templates, apps and etc. out there to choose from, so find what works for you.

# Evaluation

How do you know you’ve been successful in achieving your goals? What are some of the ways you can measure success? Obviously, the main way would be that your book is published and being read by others. That is a clear measure of success.

However, there are other measures of success. One of them might be the amount of time you spend writing each day/week, finishing a chapter, a rough draft, or second draft, hiring an editor, shopping your book to agents or editors, sharing your work with a critique group, having 5, or 10, or 100, 1000 or 1 million people read your book. These are quanitative measures of success.

There are quantitative measures of success and qualitative ones. It’s important to have both types of measurements, so that writing is not only externally driven, but internally driven as well. True happiness in life comes from our internal environment; qualitative success is where we will ultimately derive most of our meaning from writing.

Qualitative measures of success could be, for example, your story holding up to your original vision, your satisfaction with your writing-life balance, the way your creative project adds value to your life, such as making connections with other writers, feeling like a creative being, exploring your personal life’s offering to the universe—what you have to give that no one else on this planet has to give. Telling that story, whether you finish it or not, whether you publish it or not, telling that story is valuable.

# Appendix 1: title

As I mentioned, you want to keep your Creative Strategic Plan useful, and so you don't want to gum up all the works with an overflood of information. BUT, you also don't want to have a million documents with information stored in different places. That's where appendices come in. For each area that becomes a little bogged down, just copy-paste that writing into an appendix and then keep your Plan concise, flowing and useful.

Types of appendices might include research into:

Setting

Plot problems (and solutions!)

Character

Audience

Market

Resource Audit

Agents

Technology

Social media

# Appendix 2: title

# Appendix 3: title

# Appendix 4: title