

Business Planning Worksheet:
Set Strategies & Objectives



Set Strategies & Objectives for your Employee Resource Group

1. List the key strategies, goals and objectives of your company

Your company has probably published its strategies and objectives as part of its annual report or on its Web site. Start by listing those first – but don't forget the "unwritten" objectives and don't just list "soft" or people-oriented goals.

2. List the strategies (with goals and objectives) of your employee resource group (ERG)

Why does your ERG exist? What do you hope to accomplish? Be specific, but also open-ended – for example, adding non-discrimination policies is a good goal, but is that the only policy that needs attention? A broader strategy might be, "Encourage adoption of LGBT-inclusive company policies and practices". Don't forget to have a strategy around effective operations for your group.

3. Match your ERG's strategies with your company's strategies.

Are there any gaps? For example, if one of your company's strategies is to be a market leader, is your ERG helping to play a part in that?

1. List Key Company Strategies (Number them 1 – x)	
1.	
2.	
3.	
4.	
5.	
6.	

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2. List ERG Strategies & Objectives (Label A – Z)	
A.	
B.	
C.	
D.	
E.	
F.	

3. Match ERG Strategies with Company Strategies		
Company Strategy / Objective	ERG Strategy (A – F)	Describe how it aligns with the company strategy or objective – why is this important?
1.		
2.		
3.		
4.		
5.		
6.		

Business Planning Worksheet:
Plan and prioritize your ERG's activities



ERG Strategy / Goal	Aligns with Company Strategy / Objective
<p>C.</p> <p><i>Your strategy statement should include why it's important and what goals you hope to accomplish – use the content from the previous tables.</i></p>	

Supporting activities

Description	Metrics	Budget Required	Results

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Plan and prioritize your ERG's activities



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