|  |  |  |
| --- | --- | --- |
| **Strategy Ref.**  |  **Situation being analyzed:** |  **Date Raised:** |
|  |  |  |

Use this template to help determine internal issues relevant to your organisation's purpose and strategic direction that may affect its ability to achieve the intended result(s) of its QMS. This information should be retained as a strategy or tactical planning document to underpin your organization’s policies and to provide a road map to achieve future goals.

Note 1: Issues can include positive/negative factors or conditions for consideration.

Note 2: Understanding the internal context considers values, culture, knowledge and performance of the organization.

| The Organization | Applicable | Not Applicable | List Requirements |
| --- | --- | --- | --- |
| **Why:**  | Purpose/intended result |   |   |   |
| **What:** | Products and services |   |   |   |
| **When:** | Short term |   |   |   |
| Long term |  |  |  |
| **Where:** | International |  |  |  |
| National |   |   |   |
| Regional |  |  |  |
| Local |  |  |  |
| **For Whom**: (Internal) | Employees |  |  |  |
| Shareholders |  |  |  |
| Owners |  |  |  |
| Board of Directors |  |  |  |
| **For Whom**: (External) | Customers |  |  |  |
| Suppliers |  |  |  |
| Community |  |  |  |
| ISO |  |  |  |
| Regulators |  |  |  |
| **How:** (Strategic direction) | Where are we going? |  |  |  |
| How will we get there? |  |  |  |
| What is the timeline? |  |  |  |
| What does arrival look like? |  |  |  |
| What are the milestones? |  |  |  |

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| Conclusions |
|  |
| Recommendations |
|  |