

DEI Strategic Planning Template

Organization Overview

Company Name: Industry:
Current Market Position: Primary Competitors:

DEI Value Drivers

Financial Impact Potential

Projected revenue increase:
Cost savings opportunities:
ROI metrics:

Innovation Opportunities

New product/service possibilities:
Process improvement areas:
Market gaps identified:

Market Expansion

Target demographics:
Geographic opportunities:
New market segments:

Talent Advantages

Recruitment benefits:
Retention improvements:
Skill diversity gains:

Customer Benefits

Service improvements:

Product relevance:

Brand perception:

Stakeholder Analysis

For each stakeholder group (Senior Leadership, Middle Management, Employees, Customers):

Current State:

Desired State:

Key Concerns:

Value Proposition:

Resource Requirements

Budget

One-time costs:

Ongoing expenses:

Contingency funds:

Personnel

New hires needed:

Training requirements:

External consultants:

Technology

Software needs:

Hardware requirements:

Integration needs: