

HISTORICAL PERFORMANCE

High-level business goals

	Now	Last Year	Year -2
Revenue			
Profit			

Personal goals

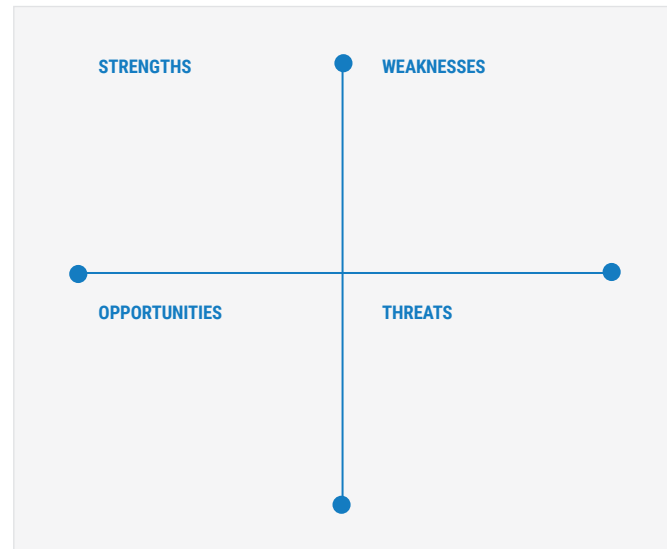
Exit planning goals

	Now	Future	Ownership Succession
Wage			Will you sell/exit the business?
Stress			When?
Hours			Amount?

What makes your business different?

How do you stand out from the crowd?

HISTORICAL PERFORMANCE



REVENUE BY PRODUCT/SEGMENT

Name	Revenue	+/- last year	Forecast Growth
Total Revenue			

OUR CUSTOMERS NEEDS

Criteria (Area of observation)	Comparison to our competitor									
	Poor			Equal				Better		
	0	1	2	3	4	5	6	7	8	9
	0	1	2	3	4	5	6	7	8	9
	0	1	2	3	4	5	6	7	8	9
	0	1	2	3	4	5	6	7	8	9
	0	1	2	3	4	5	6	7	8	9

OUR COMPETITORS

Competitor Name	What they do better	What we do better	Our Competitors													
			Product/Price (Low / High)						Marketing/web (Low / High)							
			0	1	2	3	4	5	6	0	1	2	3	4	5	6
			0	1	2	3	4	5	6	0	1	2	3	4	5	6
			0	1	2	3	4	5	6	0	1	2	3	4	5	6
			0	1	2	3	4	5	6	0	1	2	3	4	5	6

OUR CUSTOMERS

Target Market	Potential Revenue (%)	How can you be more successfull to this segment?	How well have you													
			Met their needs			Marketed to them										
			Low	High		Low	High									
			0	1	2	3	4	5	6	0	1	2	3	4	5	6
			0	1	2	3	4	5	6	0	1	2	3	4	5	6
			0	1	2	3	4	5	6	0	1	2	3	4	5	6
			0	1	2	3	4	5	6	0	1	2	3	4	5	6

OUR CULTURE

WHAT % OF YOUR STAFF ARE ENGAGED?

WHAT DO YOU DO WELL?

WHAT DON'T YOU DO WELL?



GOALS TIMEFRAME = _____

NEW CUSTOMERS

REVENUE

GROWTH

ENGAGED EMPLOYEES

OBJECTIVES

HIGH-LEVEL BUSINESS GOALS

	Now	Year 1	Year 2
Revenue			
Profit			

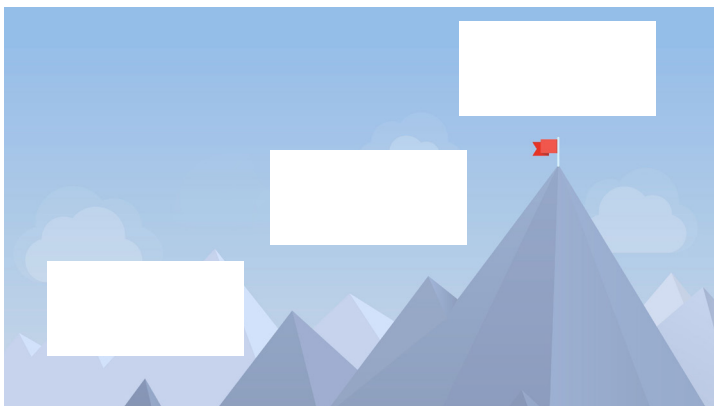
OUR CULTURE

WE EMPLOY PEOPLE THAT...
CUSTOMERS REMEMBER OUR BRAND BECAUSE...
WE ENCOURAGE AN ENVIRONMENT THAT...

OUR STRATEGIES

Marketing & Customer
System & Operations
People & Training
Innovation & Development

HIGH LEVEL STRATEGIES



90 DAY PRIORITIES

