

Step 1 – High-level goals and strategy

High-level business goals

	Now	Year 1	Year 2
Revenue			
Profit			

Personal goals

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

What makes your business different?

How do you stand out from the crowd?

What are your key high-level strategies?

1.	
2.	
3.	
4.	

Step 2 – What are you pain points?

What keeps you awake at night?

Pain Points	Priority	Impact	Financial Impact
What is the pain point?	High Medium Low	High Medium Low	Potential financial improvement
1.			
2.			
3.			
4.			
5.			
6.			

Step 3 – What are you Priority Focus Areas?

Business Strategy & Plans



- ☐ High
- ☐ Medium High
- ☐ Medium
- ☐ Medium Low
- ☐ Low

Exit & Succession



- ☐ High
- ☐ Medium High
- ☐ Medium
- ☐ Medium Low
- ☐ Low

Strategy Execution



- ☐ High
- ☐ Medium High
- ☐ Medium
- ☐ Medium Low
- ☐ Low

People Issues



- ☐ High
- ☐ Medium High
- ☐ Medium
- ☐ Medium Low
- ☐ Low

Financial Health



- ☐ High
- ☐ Medium High
- ☐ Medium
- ☐ Medium Low
- ☐ Low

Systems & Processes



- ☐ High
- ☐ Medium High
- ☐ Medium
- ☐ Medium Low
- ☐ Low

Step 4: 90 Day Action Plan

Action	Who	When

Key Phrases

What are your current business challenges?

If you could wave a magic wand over your business what would you like to achieve?

You can't be expected to know everything. Our program is about filling in some of those blanks for you.

Why re-invent the wheel?

You need take an aerial view of your business.

You need to break the cycle. If you do nothing – nothing will change.

You are an expert in your business.....we are an expert in the systems and processes to build your business.