Legal Notices

All rights reserved. No part of this publication may be reproduced in any form or by any means graphic, electronic or mechanical including recording, photocopying or by any other information storage or retrieval system, without the written consent of the publisher.

This publication is sold as an educational reference only. While all attempts have been made to verify information provided in this publication, neither the author nor the Publisher assumes any responsibility for errors, omissions or contrary interpretation of the subject matter herein.

This publication is not intended for use as a source of legal or accounting advice. The Publisher wants to stress that the information contained herein may be subject to varying state and/or local laws or regulations. All users are advised to retain competent counsel to determine what state and/or local laws or regulations may apply to the user’s particular business.

The purchaser or reader of this publication assumes responsibility for the use of these materials and information. The author and Publisher assume no responsibility or liability whatsoever on the behalf of any purchaser or reader of these materials. We expressly do not guarantee any results you may or may not get as a result of following our recommendations.
CHAPTER #1: The End of Your Business

A. Write down your customer-focused vision statement

________________________________________________________
________________________________________________________
________________________________________________________
________________________________________________________
________________________________________________________

B. Write down your business-focused vision statement

On ______ (date), I will ______________ (type of exit) resulting in __________ ($ amount).
________________________________________________________
________________________________________________________
________________________________________________________
________________________________________________________
________________________________________________________
C. Define your **financial metrics** vision at exit

Revenues: ___________________________________________ ___________

EBITDA: ___________________________________________ _____________

Market Share: ______________________________________ _____________

Other: ____________________________________________ ______________

___________________________________________________ ____________

D. Define your **business assets** vision at exit

Customers/marquee customers: ___________________________ __________

Products: ___________________________________________ ____________

Services: ____________________________________________ ___________

Technology/Intellectual property: ________________________ ____________

Distribution network: _______________________________ ______________

Location(s): _______________________________________ ______________

Reputation/Brand (trademarks/copyrights): ______________ ______________

Team/employee talent: ______________________________ ______________

Financial & Operational Systems/processes: __________________________

Strategic partnerships: ______________________________ ______________

Other: ____________________________________________ ______________

___________________________________________________ ____________
CHAPTER #2: Confirming the Opportunity

A. Write down and rank your strengths

___________________________________________________ ____________
___________________________________________________ ____________
___________________________________________________ ____________
___________________________________________________ ____________
___________________________________________________ ____________

B. Write down your top opportunities for growth

___________________________________________________ ____________
___________________________________________________ ____________
___________________________________________________ ____________
___________________________________________________ ____________
___________________________________________________ ____________
___________________________________________________ ____________
C. Write down how your growth opportunities rank against:

1) Your Strengths

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

2) The Ansoff Matrix

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________
3) Market Criteria

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

4) Financial Projections

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

D. Write down, in order of importance, your top 1-3 opportunities to grow your business

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
CHAPTER #3: Goals & Milestones

A. Write down/confirm exit vision

On ______ (date), I will ________________ (type of exit) resulting in __________ ($ amount).

___________________________________________________

___________________________________________________

___________________________________________________
B. Define Your Financial Metrics Vision for this Year

Revenues: ________________________________________________

Revenue Growth: ________________________________________

EBITDA: ________________________________________________

Market Share: __________________________________________

Other: _________________________________________________

C. Define Your Business Assets Vision for this Year

Customers/marquee customers: ____________________________

Products: ______________________________________________

Services: ______________________________________________

Technology/Intellectual property: __________________________

Distribution network: __________________________________

Location(s): ___________________________________________

Reputation/Brand (trademarks/copyrights): __________________

Team/employee talent: _________________________________

Financial & Operational Systems/processes: _________________

Strategic partnerships: _________________________________

Other: _________________________________________________

____________________________________________________

____________________________________________________
D. Define Your Financial Metrics Vision for this Quarter

Revenues: ________________________________
Revenue Growth: ________________________________
EBITDA: ________________________________
Market Share: ________________________________
Other: ____________________________________
________________________________________
________________________________________

E. Define Your Business Assets Vision for this Quarter

Customers/marquee customers: ________________________________
Products: ________________________________
Services: ________________________________
Technology/Intellectual property: ________________________________
Distribution network: ________________________________
Location(s): ________________________________
Reputation/Brand (trademarks/copyrights): ________________________________
Team/employee talent: ________________________________
Financial & Operational Systems/processes: ________________________________
Strategic partnerships: ________________________________
Other: ____________________________________
________________________________________
________________________________________
F. Define Your Financial Metrics Vision for this Month

Revenues: __________________________________________
Revenue Growth: ____________________________________
EBITDA: __________________________________________
Market Share: ______________________________________
Other: ____________________________________________
___________________________________________________
___________________________________________________

G. Define Your Business Assets Vision for this Month

Customers/marquee customers: __________________________
Products: __________________________________________
Services: __________________________________________
Technology/Intellectual property: ______________________
Distribution network: _______________________________
Location(s): _______________________________________
Reputation/Brand (trademarks/copyrights): ______________
Team/employee talent: ______________________________
Financial & Operational Systems/processes: ______________
Strategic partnerships: _____________________________
Other: __________________________________________
___________________________________________________
___________________________________________________
CHAPTER #4: Achieving Your Financial Metric Goals

A. In the chart below, identify the KPIs you will track, how often you will track them, and against what you will judge your performance.

<table>
<thead>
<tr>
<th>Key Performance Indicators (KPIs)</th>
<th>Frequency</th>
<th>Versus</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
B. Define how you will maintain your financial dashboard

1. What program will you use to maintain your dashboard, for example, Microsoft Excel? Google Doc? Etc.?

___________________________________________________

___________________________________________________

___________________________________________________

2. Who will manage it?

___________________________________________________

___________________________________________________

___________________________________________________

3. Who will be responsible for adding what data?

___________________________________________________

___________________________________________________

___________________________________________________
CHAPTER #5: Achieving Your Business Asset Goals

A. Complete your big picture Gantt chart to include ALL of the key business assets you want to build in next 12 months

| Business Asset | Person Responsible | Status | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |

|                 |                    |        |   |   |   |   |   |   |   |   |   |    |    |    |    |
|----------------|--------------------|--------|---|---|---|---|---|---|---|---|---|----|----|----|    |
B. Complete project Gantt charts for your two most important projects

**Project:** ________________________________

**Project Manager:** _________________________

<table>
<thead>
<tr>
<th>Month</th>
<th>Task/Activity</th>
<th>Person Responsible</th>
<th>Status</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>---------------</td>
<td>--------------------</td>
<td>--------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>----</td>
<td>----</td>
<td>----</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>---------------</td>
<td>--------------------</td>
<td>--------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>----</td>
<td>----</td>
<td>----</td>
</tr>
<tr>
<td>Task/Activity</td>
<td>Person Responsible</td>
<td>Status</td>
<td>Month</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------</td>
<td>--------</td>
<td>-------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>5</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>7</td>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>9</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>11</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CHAPTER #6: Systematizing Your Business

A. Write down the key systems that you need to create in your business (and then prioritize them). For each, mark whether you need a process map, standard operating procedures and/or guidelines/policies.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
CHAPTER #7: How to Out-Market Your Market

A. Create your detailed customer profile

1. What needs, wants, or desires does your offering satisfy, or what problems does your product or service solve? (E.g., cleanliness, exclusivity, results, safety, timeliness, convenience, atmosphere)

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

2. How much do your products or services cost? (E.g., are you going after the mass market? Do you offer a luxury good?)

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

3. Who is the customer decision maker who chooses whether to buy your products or services? Is there also a customer influencer? (E.g., kids influencing mom to buy a toy)

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
4. How do customers purchase your products? (E.g., website, retail store—in which case the target customer will need to live within a certain geographic area—etc.)

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

5. Where do your customers live or work? ________________

6. How old are they? ______________________________

7. What is their income? ______________________________

8. What gender(s) are they? ______________________________

9. What nationality or ethnicity are they? ______________________________

10. What is their average household size? ______________________________

11. In what occupations do they work? ______________________________

12. What language(s) do they speak? ______________________________

If you are serving business customers:

13. What is their company revenue? ______________________________

14. What industry are they in? ______________________________

15. What is their job function or title? ______________________________

16. To whom do they report? ______________________________
17. What activities do your customers enjoy? ______________________

__________________________________________________________

18. What interests do they have? ______________________________

__________________________________________________________

19. What are their strongest opinions? _________________________

__________________________________________________________

20. What attitudes do they have? _____________________________

__________________________________________________________

21. What do they believe in? _________________________________

__________________________________________________________

22. What are their core values? _______________________________

__________________________________________________________
B. Lead Generation Sources

1. Mark which lead generation sources you are currently using and which ones might prove profitable in the future. [Make sure you include testing these new sources in your annual plan]

Direct Mail __________________________________________________________

________________________________________________________

Print Ads ____________________________________________________

________________________________________________________

Radio and TV Ads __________________________________________

________________________________________________________

Networking ________________________________________________

________________________________________________________

Telemarketing ______________________________________________

________________________________________________________

Event Marketing ____________________________________________

________________________________________________________

Email and Print Newsletter Marketing __________________________

________________________________________________________
<table>
<thead>
<tr>
<th><strong>Press Releases/PR</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>--</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Search Engine Optimization/Marketing</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>--</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Social Media Marketing</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>--</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Partnerships</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>--</td>
</tr>
</tbody>
</table>
CHAPTER #8: Securing & Locking Up Your Customers

A. Create Your Unique Selling Proposition (USP)

1. Write down key values and/or benefits your customers receive

2. Write how customers feel after consuming

3. Document how your company is unique

4. Write how you’d like customers to perceive your business
5. Combine your answers

___________________________________________________

___________________________________________________

___________________________________________________

6. Condense your long USP summary into just one line

___________________________________________________

___________________________________________________

B. Improve your offers

1. Mark which offers you will try and the details of each

Free Offers & Free Trials

 Guarantee Offers

 Packaged Offers

 Discount Offers

 Premium Offers
C. Write down sales scripts that you can create or improve

___________________________________________________

___________________________________________________

___________________________________________________

D. Write down how you can increase your social proof

___________________________________________________

___________________________________________________

___________________________________________________

E. Write down what you will do to nurture your prospects

___________________________________________________

___________________________________________________

___________________________________________________

F. Write down how you will improve prospective customers’ perceptions of you.

___________________________________________________

___________________________________________________

___________________________________________________
G. Optimizing your transaction prices

1. Mark which ways you will use to optimize transaction prices and the details of each

Raising Prices

Offering Product or Service Packages

Up-Selling and Cross-Selling

Increasing the Order Size
H. Optimizing lifetime customer value

1. Mark which ways you will use to optimize lifetime customer value and the details of each

Ongoing Communications

Loyalty Programs

Continuity or Membership Programs

I. Document how you will use and/or improve your referral program
CHAPTER #9: Developing Your HR Plan

A. Complete your *end-game* org chart

(Add to the structure of the sample org chart below (e.g., add new boxes and/or lines) as needed).
B. Complete your **current** org chart

*(Add to the structure of the sample org chart below (e.g., add new boxes and/or lines) as needed).*
C. Complete your annual org chart

(Add to the structure of the sample org chart below (e.g., add new boxes and/or lines) as needed).
CHAPTER #10: Documenting Your Strategic Plan

A. Checklist for completing your strategic plan

1. Executive Summary
   - Complete last; summarize key objectives and key parts from other sections)

2. Company Vision Statements
   - Include your customer- and business-focused visions, and financial metrics and business assets goals

3. Opportunities to Pursue
   - Document the opportunities you have chosen to pursue and why

4. Goals and Milestones
   - Document your exit or five-year, one-year, quarterly, and monthly financial metric and business asset goals

5. Financial Metrics and KPIs
   - Document the KPIs you will track in your business

6. Business Assets
   - Document the business assets you need to develop in the coming year, and the individual projects you must complete to build them

7. Systematization Plan
   - Detail the new systems you have prioritized for creation

8. Marketing Plan
   - Detail your marketing plan

9. Human Resources Plan
   - Include your three organization charts, list your current employees and their roles, identify new employees that you need to hire this year

10. Financial Projections
    - Include your strategic plan’s financial implications
CHAPTER #11: How to Progress Even Faster

A. Identify the highest and lowest value uses of your time

1. Write down the tasks/projects you do that add the most value to your company? [Start spending more time on these tasks]

2. Write down the lowest value tasks that you do (e.g., sending faxes) that you do [Find other people to start doing them for you]
CHAPTER #12: Becoming A Better Leader

A. Checklist to ensure you continue to properly motivate your employees

Periodically review the list below to make sure you are properly motivating your employees. Include relevant notes regarding how you would like to use these motivational techniques below.

1. Make employees feel they are doing something meaningful
   __________________________________________________________
   __________________________________________________________

2. Effectively communicate and share information
   __________________________________________________________
   __________________________________________________________

3. Give employees clear job descriptions and accountability
   __________________________________________________________
   __________________________________________________________

4. Give and receive ongoing performance feedback
   __________________________________________________________
   __________________________________________________________

5. Have—and show—faith and trust in your team
   __________________________________________________________
6. Listen to, focus on, and respect your employees’ needs

7. Provide recognition to worthy employees

8. Provide fair compensation and pay for the performance you seek

9. Foster innovation

10. Establish fair company policies that support the company’s goals

11. Get ongoing input from employees
12. Manage, but don’t micromanage

_________________________________________________________________________

_________________________________________________________________________

13. Encourage teamwork

_________________________________________________________________________

_________________________________________________________________________

14. Modify your management approach for different types of employees

_________________________________________________________________________

_________________________________________________________________________

15. Give employees opportunities for personal growth

_________________________________________________________________________

_________________________________________________________________________

16. Fire people when needed

_________________________________________________________________________

_________________________________________________________________________
CHAPTER #13: Multiplier Tactics

A. Identify the 5 things that worked best in your business and that worked worst in your business in the last year (and start doing more of what worked)

1. Top 5 things that worked in last 12 months

1. _____________________________________________________________
   _____________________________________________________________

2. _____________________________________________________________
   _____________________________________________________________

3. _____________________________________________________________
   _____________________________________________________________

4. _____________________________________________________________
   _____________________________________________________________

5. _____________________________________________________________
   _____________________________________________________________

1. Top 5 things that did NOT work well in last 12 months

1. _____________________________________________________________
   _____________________________________________________________

2. _____________________________________________________________
   _____________________________________________________________

3. _____________________________________________________________
   _____________________________________________________________
4. ____________________________

5. ____________________________

B. Develop an Advisory Board

Identify people who would be ideal candidates for your Advisory Board (then start contacting them)

1. ____________________________

2. ____________________________

3. ____________________________

4. ____________________________

5. ____________________________

6. ____________________________

7. ____________________________

8. ____________________________

9. ____________________________

10. ____________________________

11. ____________________________

12. ____________________________

13. ____________________________

14. ____________________________

15. ____________________________