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**Your Business Planning Board - 2017 Business: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **SWOT – Top 2** |
| **Strengths:****Weaknesses:****Opportunities:****Threats:** |
| **Business Model** |
| **Unique Selling Proposition:****Perfect Client:****Revenue Stream:****Key Performance Indicators:** |

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| **Successes:** |
| **What Could Have Gone Better:** |
| **Ideas Not Implemented:** |
| **Two Toughest Challenges/Opportunities:** |

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| **Top 3 Priorities:** |
| **Financial Goals:**1. **Revenue**
2. **Profits**
* **Gross**
* **Net**
 |
| **High Level Goals/Strategies:**  |

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**Priorities/Strategies - 2017 Business: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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| **Leadership**1. Mission, Vision, Culture2. Strategy/ Business Model a. Business Model* What is your business?
* What problem solved
* Unique Selling Proposition
* Target Customers/ Perfect Customers
* Revenue Streams
* Cost Structure

 b. New Products/ Services c. New geography d. Gaining Market Share3. Performance Management/ Development a. Organizational Chart – current/future b. Recruiting/ Hiring* Pre-recruiting process
* Hiring process
* Onboarding

 c. Training program* skill
* team development

 d. Performance Management* Communication plan/ structure
* KPI’s
* Performance appraisal process
* Compensation
* Career development

4. Leadership Development* Style assessment
* Time mastery
* Delegation
* Management meeting structure
* Communication structure/messages
 | **Growth**1. Financial Planning1. Budget – Sales
2. Cash flow management
3. Price management
4. Supplier management
5. Key Performance Indicators
6. Financial reporting

2. Business Planning1. Assessment
2. Goals
3. Actions/Strategies
4. 90 day plan

3. Business development plan1. New products
2. New customer groups
3. New geography

4. Sales management1. Sales goals
2. By product
3. Sales incentive
4. Conversion rate
5. Other sales KPI’s

5. Marketing management1. Message
2. Marketing plan
* Social media
* Website
* Advertising
* Other
1. ROI analysis

6. Operations/ Systemization1. Computer backup/disaster recovery
2. Software strategy/ upgrades (CRM/ERP)
3. Process documentation
4. Database management
 | **Transitioning**1. Exit Goals1. Personal
2. Financial

2. Driving Business Value1. Customer diversity
2. Management & staff
3. Systemization
4. Recurring revenue
5. Desirable Proprietary Products
6. Team of professionals
7. Product diversity
8. KPI’s
9. Written growth plan
10. Book keeping

3.Transition Options1. Selling
2. Transfer to employee
3. Transfer to children

4. Business Valuation5.Transition Execution Plan1. Business continuity
2. Personal wealth & estate planning
3. Structuring the deal
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