**Priorities/ Strategies - 2020**  **Business:**

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| **Leadership**  \_\_\_ **1. Mission, Vision, Culture**  \_\_\_ **2. 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 Share  **\_\_\_ 3. Performance Management/ Development**  \_\_\_ a. Organizational Chart – current/future  \_\_\_ b. Recruiting/ Hiring   * Pre-recruiting process * Hiring Process * On-boarding   \_\_\_ 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   **Other:** | **Growth**  \_\_\_ **1. Financial Planning**  \_\_\_ a. Budget – Sales  \_\_\_ b. Cash flow management  \_\_\_ c. Price management  \_\_\_ d. Supplier management  \_\_\_ e. Key Performance Indicators  \_\_\_ f. Financial reporting  **\_\_\_ 2. Business Planning**  \_\_\_ a. Assessment  \_\_\_ b. Goals  \_\_\_ c. Actions/Strategies  \_\_\_ d. 90 day plan  \_\_\_ **3. Business development plan**  \_\_\_ a. New products  \_\_\_ b. New customer groups  \_\_\_ c. New geography  **\_\_\_ 4. Sales management**  \_\_\_ a. Sales goals  \_\_\_ b. By product  \_\_\_ c. Sales incentive  \_\_\_ d. Conversion rate  \_\_\_ e. Other sales KPI’s  \_\_\_ **5. Marketing management**  \_\_\_ a. Message  \_\_\_ b. Marketing plan   * Social media * Website * Advertising * Other   \_\_\_ c. ROI Analysis  \_\_\_ **6. Operations/ Systemization**  \_\_\_ a. Computer backup/disaster recovery  \_\_\_ b. Software strategy/ upgrades  (CRM/ERP)  \_\_\_ c. Process documentation  \_\_\_ d. Database management  **Other:** | **Transitioning**  **\_\_\_ 1. Exit Goals**  \_\_\_ a. Personal  \_\_\_ b. Financial  **\_\_\_ 2. Driving Business Value**  \_\_\_ a. Customer diversity  \_\_\_ b. Management & staff  \_\_\_ c. Systemization  \_\_\_ d. Recurring revenue  \_\_\_ e. Desirable Proprietary Products  \_\_\_ f. Team of professionals  \_\_\_ g. Product diversity  \_\_\_ h. KPI’s  \_\_\_ i. Written growth plan  \_\_\_ j. Bookkeeping  **\_\_\_ 3. Transition Options**  \_\_\_ a. Selling  \_\_\_ b. Transfer to employee  \_\_\_ c. Transfer to children  **\_\_\_ 4. Business Valuation**  **\_\_\_ 5. Transition Execution Plan**  \_\_\_ a. Business continuity  \_\_\_ b. Personal wealth & estate planning  \_\_\_ c. Structuring the deal  **Other:** |