**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:**  |