



## 5-YEAR LOOK

We'd avoided planning because no one could stand the idea of a planning "retreat" where we spent hours word-smithing some boring vision statement. What was surprising about The 5-Year Look wasn't just how quick it was, but it made us realize that we've already got the momentum and experience to be successful year after year.

### Introduction

Writing a "vision statement" doesn't have to be a frustrating and time-consuming—and ineffective—committee activity. The **5-Year Look** provides a common-sense structure for painting a word picture of your future. It also gives leaders a 1-page summary to show your record of success to partners, lenders and investors.

HIGHLIGHTS OF OUR ORGANIZATION			
	5 YEARS AGO	TODAY	5 YEAR
Key product/service:	• WidgetOne	• Widget family	• Widge
Revenue:	• \$19,000,000	• \$31,500,000 (+66%)	• \$45-5k
Income:	• \$500,000	• \$2,300,000	• \$5-7.0
Employees:	• 12	• 20	• 25-28
Customers:	• 100	• 210	• 400-45
Facilities:	• 10,000 SF, 1 building	• 15,000 SF, 1 building	• Added
<b>STRUCTURE</b>	• Managed by founders • Business plan	• Strategic plan • JV with ACME Supply • Advisory board	• ESDP • Nation
<b>MARKETING &amp; SALES</b>	• Static website • 3 independent sales reps	• Online ordering • Regular market research • 3 inside sales reps	• Custor • Robus • Target
<b>OPERATIONS</b>	• 3 processing machines • 3 key suppliers	• Quality management system • ISO 14000 • First robotics	• Outso • RFID it • Six sig
<b>INFORMATION</b>	• ERP	• New CRM • New business intelligence	• All clo • Updat
<b>HUMAN RESOURCES</b>	• No HR leader	• HR Director • Employee manual	• State • Comm

### Benefits

The Center's tools minimize omissions, improve communications and foster collaboration. The **5-Year Look**:

- Shows everyone the great things they've already accomplished together
- Ensures everyone has a balanced view and plan
- Frames a discussion of what really matters for success

**Difficulty**    Easy  
**Estimated time required**    4-8 hours  
**Special skills**    None

### Instructions

The point is to list the features that best represent your organization (The GM's Index of Terms might prompt ideas). Feel free to edit the data sets in the top row.

1. Start with the "5 Years Ago" column (it's OK to change it to some other number).
2. People forget their accomplishments, yet remember their problems. Be objective.
3. Then complete the "Today" column. You don't have to include everything.
4. The "5 Years from Now" column is harder, so stick to 3 things per discipline.

Members can contact the Center for assistance: [info@theindex.net](mailto:info@theindex.net)

### Make It Better!

Member should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.

This planning tool helps leaders answer the question, *Where are we going?* Start with the first two columns, then complete the last one as part of Question-Based Planning. See [The GM's Index of Terms](#) for concepts.

NAME

**5-Year Look: Where are we going?**

November 22, 2018

**HIGHLIGHTS OF OUR ORGANIZATION**

	5 YEARS AGO	TODAY	5 YEARS FROM NOW
Key product/service: Revenue: Income: Employees: Customers: Facilities:	<ul style="list-style-type: none"> <li>WidgetOne</li> <li>\$19,000,000</li> <li>\$500,000</li> <li>12</li> <li>100</li> <li>10,000 SF, 1 building</li> </ul>	<ul style="list-style-type: none"> <li>Widget family</li> <li>\$31,500,000 (+66%)</li> <li>\$2,300,000</li> <li>20</li> <li>210</li> <li>15,000 SF, 1 building</li> </ul>	<ul style="list-style-type: none"> <li>Widget, Gadgets, Service X</li> <li>\$45-50,000,000 (+45%)</li> <li>\$5-7,000,000</li> <li>25-28</li> <li>400-450 (10% int'l)</li> <li>Added Milwaukee office</li> </ul>
<b>STRUCTURE</b>	<ul style="list-style-type: none"> <li>Managed by founders</li> <li>Business plan</li> </ul>	<ul style="list-style-type: none"> <li>Strategic plan</li> <li>JV with ACME Supply</li> <li>Advisory board</li> </ul>	<ul style="list-style-type: none"> <li>ESOP</li> <li>National distribution</li> </ul>
<b>MARKETING &amp; SALES</b>	<ul style="list-style-type: none"> <li>Static website</li> <li>3 independent sales reps</li> </ul>	<ul style="list-style-type: none"> <li>Online ordering</li> <li>Regular market research</li> <li>3 inside sales reps</li> </ul>	<ul style="list-style-type: none"> <li>Customer service chat</li> <li>Robust social media</li> <li>Target ad campaigns</li> </ul>
<b>OPERATIONS</b>	<ul style="list-style-type: none"> <li>3 processing machines</li> <li>3 key suppliers</li> </ul>	<ul style="list-style-type: none"> <li>Quality management system</li> <li>ISO 14000</li> <li>First robotics</li> </ul>	<ul style="list-style-type: none"> <li>Outsourced sub-assemblies</li> <li>RFID inventory management</li> <li>Six sigma defect rates</li> </ul>
<b>INFORMATION</b>	<ul style="list-style-type: none"> <li>ERP</li> </ul>	<ul style="list-style-type: none"> <li>New CRM</li> <li>New business intelligence</li> </ul>	<ul style="list-style-type: none"> <li>All cloud-based</li> <li>Updated CRM, ERP, BI</li> </ul>
<b>HUMAN RESOURCES</b>	<ul style="list-style-type: none"> <li>No HR leader</li> </ul>	<ul style="list-style-type: none"> <li>HR Director</li> <li>Employee manual</li> <li>Engagement survey</li> </ul>	<ul style="list-style-type: none"> <li>State of the art HRIS</li> <li>Compensation in top quartile</li> <li>Successor for founders on board</li> </ul>
<b>FINANCE</b>	<ul style="list-style-type: none"> <li>Led by Controller</li> <li>150% debt:equity</li> </ul>	<ul style="list-style-type: none"> <li>Led by CFO</li> <li>75% debt:equity</li> <li>Average LOC balance of \$1M</li> </ul>	<ul style="list-style-type: none"> <li>Risk management program</li> <li>Forecast accuracy of 5%</li> <li>Business value 7X EBIDTA</li> </ul>