

# Strategic Planning Workbook

Waites  
Ventures

# Your Goals

There are 4 keys to determining and defining your goals.

1. Get Specific

What exactly do you want your business to look like? Think about products, services, annual profits, number and type of team members, locations, company culture, effect on the lives of others, etc.

2. Make it Measurable

Have your vision clearly defined with annual profits, number of team members, number of locations, etc. Determine exactly how you will know you have reached your goal.

3. Constrain it

Set a time limit! When do you want to have accomplished the goal from the business?

4. Get Excited About it

Make your goals as real in your mind as possible and dive into the depth of how this will affect your life so that not accomplishing it isn't an option.

Think about: how will your life have changed from today? why is this goal important to you? what will this do for your life? What will happen if you do not accomplish it?

Guidelines:

- Reach for a goal higher than what you would ever imagine being able to obtain.
- It doesn't have to make sense to anyone else but YOU.
- Do not feel bound by your resources, knowledge or what options are currently available.
- Imagine a situation that excites you and brings you meaning to your life.

Make sure your goals are:

- ☐ Big
- ☐ Specific, Measurable, Time Constrained, Exciting
- ☐ Absolutely Crazy
- ☐ Scares you MORE than a little

# Destination Vision

Your destination vision is your end game goal you want for your business. Whether it is to eventually sell, retire from a business someone else is running, merger, IPO, or just to shut up shop one day.

What type of business do you envision you will have built by the time you are ready to step away or pass your business on?

Detail your exit strategy; your end game; your long-term plan below. Or if that is too far off and abstract, just think of the next BIG step...like where you want to be in 5 years.

Imagine what it would be like if your business were there today. Think about things like:

- Annual profits.... not just revenue
- What are your products/services?
- Who is your client base? Do you have multiple locations; where; how many?
- What does your team look like?
- What effect do you have on others' lives?

# Destination Vision

**Exit plan/Long term goal:**

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**When will this happen:** \_\_\_\_\_

**Detail you're your business will look like:**

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**Why is this important to you?** What will accomplishing this goal do for your company and life? Imagine your life, how you feel, what you would be doing when you accomplish this...what is truly motivating to accomplish this?

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**Make sure your Destination Vision is:**

- ☐ Big
- ☐ Specific, Measurable, Time Constrained, Exciting
- ☐ Absolutely Crazy
- ☐ Scares you MORE than a little

# 1 Year Goal

What do you need to accomplish in the next year to jump start your efforts toward achieving your long-term goal?

Thinking as if you were 1 year into the future tell me:

**What will has changed from today?**

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**Detail out changes in things like:** Revenue/profits; Hours you are working ON your business versus IN your business; Your team; # of Clients/Client Retention; etc.

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**If we did a 12-month check in,** what would you tell me happened that has caused you to be completely and utterly satisfied with your results and progress towards your vision destination.

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**Why is this important to you?**

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**Make sure your goal is:**

- ☐ Big
- ☐ Specific, Measurable, Time Constrained, Exciting
- ☐ Absolutely Crazy
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# 3-Month Goal

What do you need to accomplish in the next 3 months to jump start your efforts toward achieving your long-term goal?

Thinking as if you were 3 months into the future tell me:

**What will has changed from today?**

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**Detail out changes in things like:** Revenue/profits; Hours you are working ON your business versus IN your business; Your team; # of Clients/Client Retention; etc.

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**If we did a 3-month check in,** what would you tell me happened that has caused you to be completely and utterly satisfied with your results and progress towards your vision destination.

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**Why is this important to you?**

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**Make sure your goal is:**

- ☐ Big
- ☐ Specific, Measurable, Time Constrained, Exciting
- ☐ Absolutely Crazy
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# Assessment

Answer the following questions for You AND Your Business

**What are your current strengths, resources, opportunities?**

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**What are your current limitations, roadblocks, vulnerabilities, distractions?**

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**What behaviors and skills do you need to develop?**

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# Priorities

Star your top 10 items on the prior page that will do the most toward helping you reach you 3-month goal. Then lump into categories and decide your top 2-3 priorities that will help you achieve your 3-month goal.

## Top 3 priorities to reach your goal

1.

2.

3.

## Identify milestones needed to accomplish your #1 priority




# Road Map

**Priority:** \_\_\_\_\_

**Milestone:** \_\_\_\_\_

**Describe Milestone in Detail:** \_\_\_\_\_

\_\_\_\_\_

**Start Date:** \_\_\_\_\_

**End Date:** \_\_\_\_\_

**Specific Measure(s) of Success:**

\_\_\_\_\_

\_\_\_\_\_

Specific Activity / Task	Who is Responsible	Due Date

## Focus Activity

Reviewing all your Road Maps EVERY day you will pick the one task/activity that has the biggest impact toward getting you to your 3-month goal. You can NOT let the day pass without working at least 30 minutes on your 1 thing focus activity.

**What is the 1 thing I can do today that will make everything else easier or unnecessary on my journey towards reaching my goal?**

**My 1 Thing**



# Future Work

Below is a list of additional activities to work on once your roadmaps are set out.

- How to Evaluate Progress
- Assessment of Tasks / Activities
- Setting Up Time blocking for Maximum Productivity
- Creating Documentation for Future Work Delegation/Outsourcing