

STEP 1 - High-level goals & strategy

High-level business goals

1	Now	Year 1	Year 2
Revenue			
Profit			

Use this template to help you organise your thoughts and evaluate your business. Answering these questions will enable you to plan for the future of your business. This process will help highlight the strengths and weaknesses in your business and give you some structure around goal-setting and implementing plans.



2 Personal goals		Exit planning goals	
	Now	Future	Ownership succession
Wage			Will you sell the business?
Stress			When?
Hours			Amount?

3 What makes your business different?

How do you stand out from the crowd?

4 What are your key high-level strategies?

1	
2	
3	
4	

STEP 2-3 - Strategic goals breakdown: Build your actions, milestones & 90 day plans

Review your business success factors and determine how you will achieve these goals. Develop strategies, actions and 90 day plans. Document the important ones on the next page.

Success factors - setup goals & targets

Financial		Customer		Innovation & Learning		Systems & Processes	
Revenue							
Profit							

STEP 4 - Monthly business review

- Review your business performance at the end of each month (Successes & obstacles that the business faced as well as results by each KPI)
- Review your strategy relation to each KPI, including marketing, website, sales, finance, cash & capital, customer, IT, accounts, production, human resources, innovation & any other strategic areas of the business

STEP 5 - Systemising the business

- Automate and tidy up the business
- Liability protection
- Document management - workflow / procedures
- Milestone / project accountability
- Create a replicable business model
- Customer service / Operations
- QA / Health & Safety / HR
- Budgeting & Accounting

STEP 6 - Employee engagement

Your strategy is executed by your employees. Align your employee KPIs to mirror the company KPIs.

Weekly staff priorities & accountability

Employee Performance

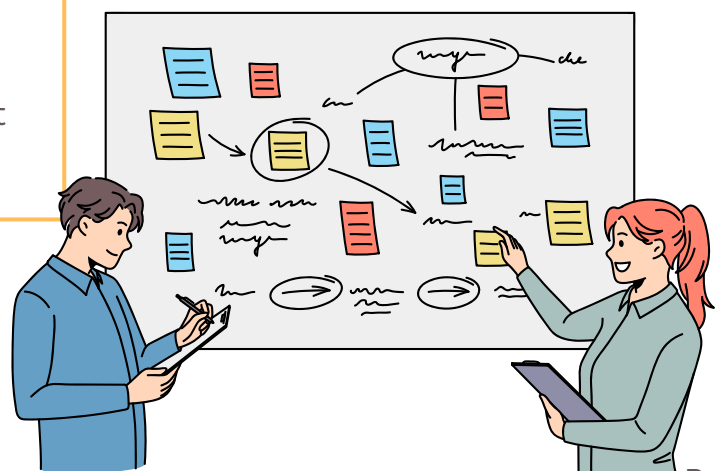
<input type="checkbox"/> One on one	<input type="checkbox"/> Weekly team	<input type="checkbox"/> Monthly	<input type="checkbox"/> Yearly
Establish a weekly 'one on one'. Record 2-4 major achievements /week	Split business into teams. Establish a weekly team meeting. Record achievements, obstacles & initiatives.	Key employees present to the team or team leader on the performance for the previous month and the plan for next month	One on one performance appraisal - measure all competencies, developments, goals & KPIs for the year

Recruitment / People / HR systems

<input type="checkbox"/> Policies & Procedures	<input type="checkbox"/> KPIs & Targets	<input type="checkbox"/> Employment Contracts	<input type="checkbox"/> Work Culture
Standardise the business - if a question is asked, add a policy!	Set KPIs for all employees based on the business culture	Employee abides by performance management system	"This is a high performance business - we expect high quality."

STEP 7 - Change culture and sustainability

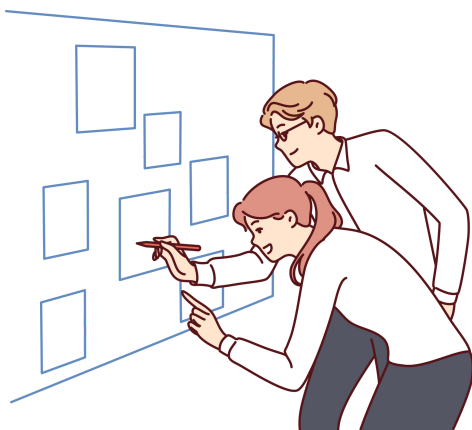
Ensure the long-term success of the program through continual top-level support and continual reinforcement of the system



What are your key milestones for this year?

Milestone	Who	When	Milestone	Who	When

What is the plan for your next 90 days?



Actions	Who	When