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| **THE SIMPLE**  **STRATEGIC PLAN** |
| WORKBOOK |
|  |



# LIFE VISION

Take some quiet time to think and dream about your ideal life and lifestyle. Imagine you are living exactly as you wish. What does that look like?

Answer the questions below to help you paint the picture of your life vision.

What is your vision for your money?

 How much do you earn?

 How much do you have in savings?

 What other assets do you have?

What is your vision for your living situation?

 Where do you live?

 What does your house look and feel like?

 What other house or houses do you have?

What is your vision for your work?

 What is your role at work?

 How much time do you spend at work?

 What is your work environment like?

What is your vision for your hobbies?

 What hobbies do you do alone?

 What hobbies do you do with a team or group?

 What hobbies do you do with your family?

What is your vision for your vacations?

 Where will you go?

 How long will you be gone?

 Who will you go with?

What is your vision for your family?

 Who is part of your family?

 What kinds of things do you do together?

 How often do you do things with your family?

What is your vision for your friends?

 Who is part of your friend circle?

 What kinds of things do you do together?

 How often do you do things with your friends?

What is your vision for giving back?

 Who do you give back to?

 What kinds of things do you do for them?

 How often and how much do you give?



**LIFE VISION CALCULATION**

**LIFE VISION CALCULATION 12**

Take time to decide how much you will need to finance your ideal lifestyle. There are columns for monthly and annual amounts. You can use either column you want for your calculations. Ultimately, you want to decide how much you need to earn in your business to fund your lifestyle of choice in ten years.

|  |  |
| --- | --- |
| **MONTHLY** | **ANNUAL** |
| Salary |  |
| Savings |  |
| Other Assets |  |
| Mortgage/Rent |  |
| Housing Expenses |  |
| Second Home Mortgage |  |
| Hobbies |  |
| Vacations |  |
| Family activities |  |
| Friend activities |  |
| Charitable giving |  |
| **Total Income Needed** |  |



# BUSINESS VISION

Now that you know what you want in your life, it is time to envision the business you will build to deliver it.

Take some quiet time to think and dream about your ideal business. Imagine you are working exactly as you wish. What does that look like?

Answer the questions below to help you paint the picture of your business vision.

What is your vision for the money part of your business?

 How much revenue do you want?

 How much profit do you want to keep?

What is your vision for the people part of your business?

 Do you want a virtual team or people on site at your office?

 Are you using contractors or employees or both?

 What is your vision for the culture of your business?

**BUSINESS VISION 16**

 Why does your team love working for your company?

 What is the focus or attitude of your culture?

What is your vision for the location of your business?

 Where is your company located?

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 Do you have a physical office/shop or are you working out of your home?

 What do people think about when they think of your company?

 What do you do better or different than others?

What is your vision for your role in the company?

 What jobs do you do?

 What uses your superpowers?

What is your vision for giving back?

 To whom do you give back?

 How much time and/or money do you give?

What is your vision for the legacy of your business?

 What happens when you retire? Do you sell the company, give it to your kids or something else?



# CORE VALUESBlue text on a black background Description automatically generated

Core values are your beliefs about how everyone should behave in your company. They are the commandments for behavior.

Keep them short and sweet so they are impactful and memorable. Let’s start with brainstorming some core values options…

 What companies do you admire and like to do business with?

 What core values do they have? You can often Google the company name and values and see their list.

 What are some beliefs about the way YOU believe business should be done?

 What behaviors do you want to see in yourself and your (future) staff?

List up to ten possible core values from the options above.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Circle the 5 that are the most powerful for you. Write them below. These will be used in your final plan.

1.

2.

3.

4.

5.



# TARGETS & GOALS

Targets are what you are aiming for three years out, between where you are now and your vision. They should be specific but they are best guesses as to where you want to be.

Goals are commitments about what you will achieve in the next year. Choose goals you are confident you can achieve. It’s better to aim a little, apply what you learn in this course and crush your goals than to fall short and repeat a cycle of failure.

Rewrite your vision here so you remember exactly what you are aiming at:

What do you want to have accomplished three years from now, in alignment with that vision? Write down what comes to mind.

Choose the 4 most important targets and write them below. These will go in your plan.

1.

2.

3.

4.

What do you want to have accomplished in the next year, in alignment with your vision and targets? Write down what comes to mind.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Choose the 4 most important goals and write them below. These will go in your plan.

1.

2.

3.

4.



# METRICS

Your metrics are how you will measure the day-to-day, repeatable activities that get you to your goals. Think about what needs to be done routinely (prospecting, appointment setting, cash flow management, etc.) that you can measure each week to ensure you’re doing enough to hit your goals.

Write your four goals here to remind yourself what you’re working towards this year:

1.

2.

3.

4.

Now, make a list of activities that can lead to achieving each goal. Goal 1:

*Activities:*

Goal 2:

*Activities:*

Goal 3:

*Activities:*

Goal 4:

*Activities:*

Now choose one activity from each list that will be what you measure each week. Decide how much of each activity you will do. This is your metrics list.

|  |  |
| --- | --- |
| **METRIC** | **QUANTITY** |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

While you’re here, transfer your metrics to your Metric Tracker worksheet.



# MANTRAS

Your mantras are phrases to keep you motivated and inspired to do the day-to-day work to achieve your goals. You will choose

a different one for each quarter. Your job, after you choose your mantra, is to read it out loud every day of the quarter to reinforce it and train your subconscious to act on it.

Make a list of the obstacles (mental, emotional, physical) that have gotten in the way of your goals in the past.

Choose the four you most want to work on.

1.

2.

3.

4.

Now, write a positive, first-person, present-tense statement for each. Make sure it motivates you when you read it. These will go into your plan.

1.

2.

3.

4.



# PROJECTS

Projects are the big changes you want to make in your company. They have a defined beginning and end, with due dates and responsible parties.

Write your four goals here to remind yourself what you’re working towards this year:

1.

2.

3.

4.

Now, make a list of projects that need to done if you are going to achieve each goal. No more than four projects per goal (but fewer are okay, too).

Goal 1:

*Projects:*

1.

2.

3.

4.

Goal 2:

*Projects:*

1.

2.

3.

4.

Goal 3:

*Projects:*

1.

2.

3.

4.

Goal 4:

*Projects:*

1.

2.

3.

4.

Now, arrange the projects by quarter so that you are not doing more than four projects in any one quarter. Think about any seasonality issues you have in your business that make doing projects harder. For example, if you are really busy during the Christmas holiday, don’t put a lot of projects in Q4.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **GOAL 1** | **GOAL 2** | **GOAL 3** | **GOAL 4** |
| **Q1** |  |  |  |  |
| **Q2** |  |  |  |  |
| **Q3** |  |  |  |  |
| **Q4** |  |  |  |  |

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