

Planning Dashboard and Action Plan

Planning Dashboard

What are the guiding principles that will inform how you operate? Think about your ideal business size, location, revenue and markets, and then conceptualize how these factors will shape your business.

MY TIMING

What is the timeline for reaching this vision or a version of it?

QUANTIFY GOALS

What are major five-year goals that put my business on the path to meeting my business design in the timeline I have stated? (If timeline is shorter, adjust.)

Example:

- **GOAL 1:** Reach sales of \$2,500,000.
- **GOAL 2:** Reach net profit of 20 percent.
- **GOAL 3:** Enter five new markets within five years.
- **GOAL 4:** Stakeholder (customers and team) 95 percent satisfaction rate as measured by survey.

QUANTIFY OBJECTIVES

What are my objectives, or the one- and three-year reflection of these goals?

Example:

GOAL 1: Reach sales of \$2,500,000. (Grow to 100 customers, with an average contract size of \$25,000, in five years.)

Tip: Not realistic? Go back and revise goal.

- **Year 3 Objective:** \$1,500,000 in sales (75 customers, with an average contract size of \$75,000, in three years)
- **Year 1 Objective:** \$500,000 in sales (33 customers, with an average contract size of \$15,000 in one year)

Action Plan: For each objective, develop an action plan. Review with team or accountability partners weekly, biweekly, or monthly. Use the template provided below.

KPIs: What key performance indicators (KPIs) will I need to track? Need more info on KPIs? Check out the Financial KPIs excursions.

Other Key Items to Track (e.g., culture, partnerships): Want to explore more about culture? Check out the Values/Culture excursions.

Other Key Items to Track (e.g., marketing reach): Interested in more on marketing? Check out the Marketing journey.

Action Plan

Year 1 Objective: (New action plan for each objective)	
Timing:	
ACTION	DUE DATE
Resources Required: (human, financial, etc.)	Obstacles/Challenges: (advisors, mentors, strategies)

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