

GOALS

1. What should happen in the next few years to make you feel that your business is successful?

1. \_\_\_\_\_

5. \_\_\_\_\_

2. \_\_\_\_\_

6. \_\_\_\_\_

3. \_\_\_\_\_

7. \_\_\_\_\_

4. \_\_\_\_\_

8. \_\_\_\_\_

2. Of these items, what would you like to see happening over the next year?

3. Of these items, which top three should be addressed in the next 90 days? Prioritize.

1. \_\_\_\_\_

1. \_\_\_\_\_

2. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

4. Of these top three priorities, which ONE would have the most positive impact on you and your business if we addressed it immediately?

\_\_\_\_\_

5. What is the value that you believe I would add to your business if we addressed these items?

\_\_\_\_\_

## CHALLENGES

1. What critical issues and/or challenges are you facing in your business today, which if you do not resolve them, could cost you significant amounts of time and money?

1. \_\_\_\_\_

5. \_\_\_\_\_

2. \_\_\_\_\_

6. \_\_\_\_\_

3. \_\_\_\_\_

7. \_\_\_\_\_

4. \_\_\_\_\_

8. \_\_\_\_\_

2. Of these items, which could cause the greatest damage if not addressed soon?

3. Of these items, which top three should be addressed in the next 90 days? Prioritize.

1. \_\_\_\_\_

1. \_\_\_\_\_

2. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

4. Of these top three issues/challenges, which ONE would save the greatest amount of time and money for you and your business if we addressed it immediately?

5. What is the value that you believe I would add to your business if we addressed these issues?