**ORGANIZATION NAME:**

**V/TO: VISION**

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| **CORE VALUES** |  | **3-YEAR PICTURE** |
| **Future Date:**  **Revenue:** $1M  **Net Profit:** $150,000  **Measurables:**  Culture – Are we still enjoying the work we are doing?  Growth –Average dollar value of contracts  Value – % o clients referring us?  **What does it look like?** |
| **CORE FOCUS™** | **Purpose/Cause/Passion**:  **Our Niche:** |
| **10-YEAR TARGET™** | Size, geographic coverage, revenue |
| **MARKETING**  **STRATEGY** | **Target Market/“The List”:** Community Development Organizations  **Three Uniques:**  **Proven Process:**  **Guarantee:** |

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| **RULES** | 1. Provide consistent value to customers, employees, suppliers, partners, lenders beyond their expectations 2. Identify the lowest possible level of skill needed for each system 3. Be a place of impeccable order and consistency (Total Experience Design) 4. All work in the model must be in an operation manual 5. Provide uniformly predictable experiences to the customer (service, appearance) | **TIME ALLOCATIONS** |
| Entrepreneur – Inovation Time  Manage: Organizing Time  Technical: Getting Things Done Time  Non-work: Free Time |

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| INNOVATE  Identify an area of challenge  Ask "how could we make this better?" | QUANTIFICATION  How do you count touches, Interactions, Sales Work Activity? | ORCHESTRATION  What do you need? Where are you in the process?  Are we delivering value or reacting? Can this be replicated? |

**ORGANIZATION NAME:**

**V/TO: TRACTION**

|  |  |  |
| --- | --- | --- |
| **1-YEAR PLAN** | **ROCKS** | **ISSUES LIST** |
| **Future Date:**  **Revenue:** $300K  **Profit:** 10%  **Measurables:**  Culture – Providing the same client experience with all consultants  Growth –# of contracts signed  Value – % of clients referring us?  **Goals for the Year:**   |  |  | | --- | --- | | 1. |  | | 2. |  | | 3. |  | | 4. |  | | 5. |  | | 6. |  | | 7. |  | | **Future Date:**  **Revenue:** $75K  **Profit:** 10%  **Measurables:** # of contracts, average value and profit of contract  **Rocks for the Quarter: Who**   |  |  |  | | --- | --- | --- | | 1. |  |  | | **2.** |  |  | | **3.** |  |  | | **4.** |  |  | | 5. |  |  | | **6.** |  |  | | 7. |  |  | | 8. |  |  | | 9. |  |  | | 10. |  |  |   With your cursor in the last row, press Tab to add another row. | |  |  | | --- | --- | | 1. |  | | 2. |  | | 3. |  | | 4. |  | | 5. |  | | 6. |  | | 7. |  | | 8. |  | | 9. |  | | 10. |  |   With your cursor in the last row, press Tab to add another row. |