

## **Business Plan Review**

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Year: \_\_\_\_\_

Goal Partner: \_\_\_\_\_

Personal or Business? *Please circle*

Remember, goals should be S.M.A.A.R.T.

(Specific, Measurable, Attainable, Ambitious, Reward-focused & Time-dated)

**Vision:** (as far as you can see for your company)

**Values:** (who are you)

**Behaviors that embody values:**

(How do I know you are living your values—walking the walk.)

### **3-Year Mission**

1. **Area of Focus:** \_\_\_\_\_

Metric: \_\_\_\_\_

2. **Area of focus:** \_\_\_\_\_

Metric: \_\_\_\_\_

3. **Area of Focus:** \_\_\_\_\_

Metric: \_\_\_\_\_

4. **Area of Focus:** \_\_\_\_\_

Metric: \_\_\_\_\_

5. **Area of Focus:** \_\_\_\_\_

Metric: \_\_\_\_\_

## **12-Month Objectives**

### 3-5 Most Important Things (MITs)

1. **MIT:** \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ On Plan: Y/N
2. **MIT:** \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ On Plan: Y/N
3. **MIT:** \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ On Plan: Y/N
4. **MIT:** \_\_\_\_\_  
 5. Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ On Plan: Y/N
6. **MIT:** \_\_\_\_\_  
 7. Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ On Plan: Y/N

### **Quarterly Goals (Priorities)**

1. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N
2. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N
3. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N
4. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N
5. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

### **1<sup>st</sup> Month's Priorities**

1. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N
2. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N
3. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

4. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

5. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

## 2<sup>nd</sup> Month's Priorities

1. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

2. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

3. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

4. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

5. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

## 3<sup>rd</sup> Month's Priorities

1. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

2. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

3. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

4. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

5. \_\_\_\_\_  
 Person: \_\_\_\_\_ Due Date: \_\_\_\_\_ Complete: Y/N

Also, so as not to forget or disregard our unmet goals of last year/quarter, please be prepared to discuss the following:

1. If a goal(s) was unmet is it really a goal?
2. If so, why was it not completed? What stood in the way?
3. What will you have you to do make this goal a priority?
4. When will this goal be met? When will you make the change?
5. As a group, how can we help you meet this goal

Include:

☐ One year org chart

☐ Three year org chart

☐ SWOT Analysis (3-5 things max). What threat(s) can put you out of business? Ensure you have contingencies.

☐ Financial Trend and Forecast

Last 2-3 years, 1 year out (future) and 3 years out.

Gross Sales

Gross profit (- COGS)

Operating expenses

Net profit (EBITA)