

Name \_\_\_\_\_ Date \_\_\_\_\_

Type of Business \_\_\_\_\_ Customers \_\_\_\_\_

Special Qualities \_\_\_\_\_

➤ The past year, has your business/income been \_\_\_ Growing, \_\_\_ Stable, or \_\_\_ Declining?

➤ This year, what are your goals?

➤ What would you love to accomplish in the next few years, if you could accomplish anything?

➤ [Who are the key people that will help get you there? (Of those, who are the most important)]

#### SKILLS

➤ What are your 2 greatest strengths?

➤ An improvement in which of these areas would have the greatest impact? (select only one)

\_\_\_ Personal Organization / being more organized;

\_\_\_ Developing Subordinates and Delegation;

\_\_\_ Productivity / spending more time in high payoff activities;

\_\_\_ Communication

➤ Why did you pick that area?

➤ What holds you back from being better at this?

➤ Once better, what will you be able to accomplish that you're not accomplishing now?

**TASK #1**

➤ Let's choose a 3-6 month project. What do you want to accomplish in the next 3-6 months that would move you significantly towards your big goal?

➤ By when do you want it completed?

➤ What's the value to you?

➤ What are some of the key steps? (just a few to clarify what you mean and how to get started)

**TASK #2**

➤ Once you've accomplished this or are well on your way, what's next, again something that takes 3-6 months?

➤ By when?

➤ What's the value to you?

➤ What are some of the key steps?