

[DATE]



This Year's Goals:

1. Increase CPR classes for Antelope Valley and Los Angeles
 - a. 1 class-per-day with 10 students-per-day @ \$50-\$60
2. Add ACLS and PALS
3. Expand House Cleaning Department into Antelope Valley with residential and at least 10 commercial contracts (dental offices, clinics, etc)
4. Grow Home Care – have it self-sustaining (8+ employees) so we can get out of the day-to-day activities
5. Launch Online Projects:
 - a. Online Academy – tutorials for home care organizations and individual care givers (membership fee)
 - b. Care Assistant online website where caregivers can promote themselves and build skills through the Online Academy, getting certified for Dementia, etc
 - c. Ask-An-Expert free app, for gerontology, caregiving, etc (i.e., what is power of attorney, or, my mother has become very forgetful within one day) – fast answers pay more

Accomplish the Next Few Years:

- Financial Independence – each entity making \$1MM to \$2MM net profit
- Self-sustaining and growing business – financially viable and more on its own without us needing to manage the day-to-day
- Not be the person dealing with the daily tasks
- Identify workers to do the daily tasks
- Create new programs (i.e., services for people going through divorce, to empower more women to start their own businesses)
- Get one of the entities so it can be sold
- Expand to Hawaii

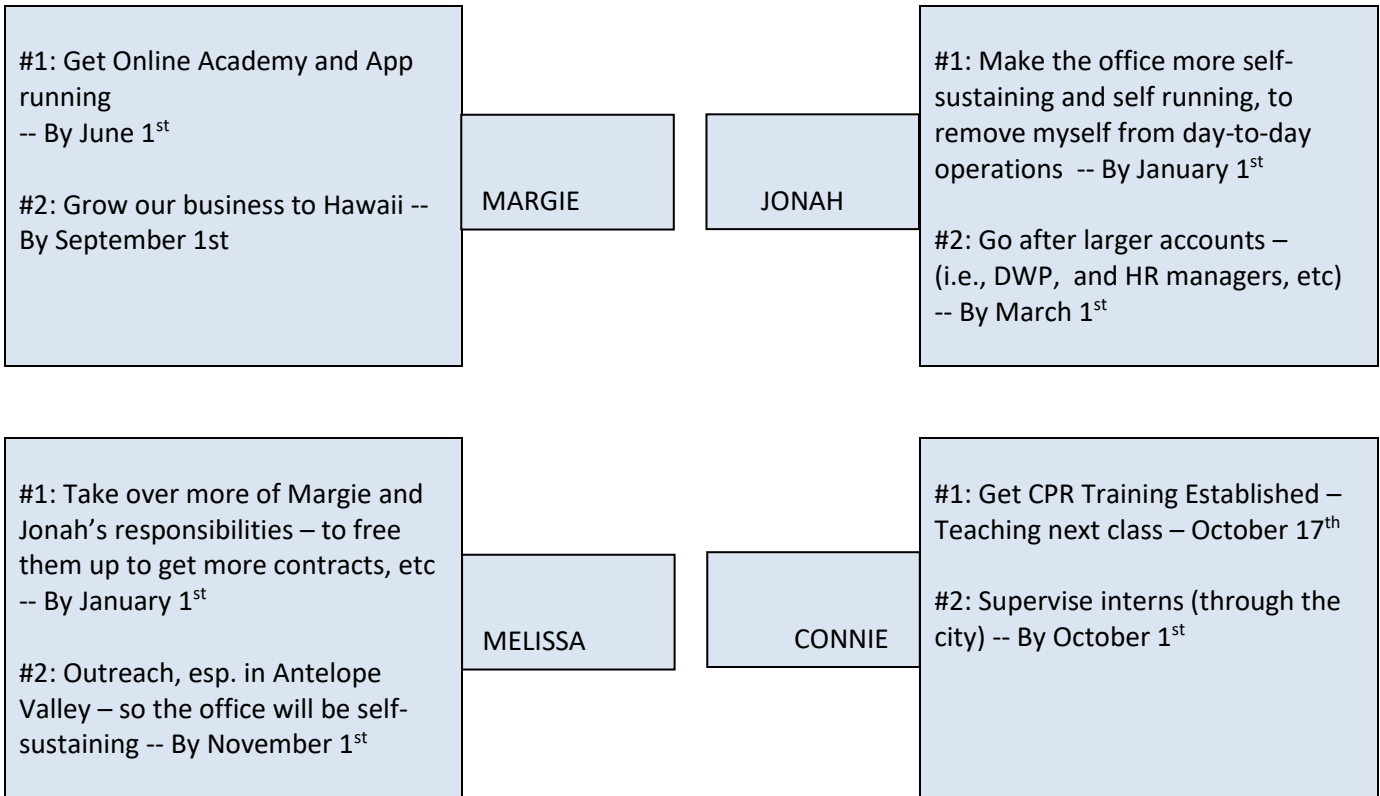
Key People: Margie, Jonah, Melissa and Connie

[DATE]

PRIMARY OBJECTIVES:

- Increase CPR classes for Antelope Valley / 1 class-per-day with 10 students-per-day @ \$50-\$60
- Add ACLS and PALS
- Expand House Cleaning Department into Antelope Valley with residential and at least 10 commercial contracts (dental offices, clinics, etc)
- Grow Home Care – self-sustaining (8+ employees) so Margie and Jonah out of day-to-day activities
- Launch Online Projects:
 - Online Academy – tutorials for home care organizations and individual care givers
 - Care Assistant online website where caregivers can promote themselves and build skills through the Online Academy, getting certified for Dementia, etc
 - Ask-An-Expert free app, for gerontology, caregiving, etc (i.e., what is power of attorney, or, my mother has become very forgetful within one day)
- Expand our business to Hawaii

PRIMARY TASKS:





TASK SUMMARY

NAME/POSITION:

MARGIE

STRENGTHS:

- Loyalty
- Excellent customer service
- Excellent work ethic
- Can multi-task
- Strength as a caregiver

AREAS FOR IMPROVEMENT:

- Writing ability – email, etc needs to have better grammar and be more professional
- Communication – shy / lacking confidence (she would be able to do more of our outreach)

OBJECTIVE:

- Make networking meetings with doctors
- Jonah have more confidence with what Margie is doing

TASK #1:

- Take over more of Melissa’s responsibilities, so when she is out of town, Margie could be the main go-to person (To free up Melissa to get more contracts, etc)
- By January 1st

SOME STEPS:

- Take a business course, to learn more about how companies operate
- Junior College –
 - Learn Microsoft Office, Excel (spreadsheets) and/or SmartSheet.com
 - Learn how to write a memo, Letter to the Mayor, etc – proper etiquette

TASK #2:

- Outreach, especially in Antelope Valley – so the office will be self-sustaining (paying salaries, office space) and generating revenue
- By November 1st

SOME STEPS:

- Take Toastmasters classes
- Establish relationships w/ City Hall (Hey Mayor, it’s Margie)
- Establish relationships with hospitals, discharge, hospices, social workers (dinner, happy hour, etc)
- Build a staff in Palmdale and supervise others



TASK SUMMARY

NAME/POSITION:

JONAH

STRENGTHS:

- Works well under pressure
- Easy to get along with
- Communication is pretty good

AREAS FOR IMPROVEMENT:

- Organization – would be able to concentrate more on high payoff activities

OBJECTIVE:

- Focus more on Forecasting, Strategic Planning, developing both client and employee relationships

TASK #1:

- Make the office more self-sustaining and self running, to remove myself from day-to-day operations (I'm the go-to person so it becomes difficult for me to focus on the things I need)
- By January 1st

SOME STEPS:

- Utilize technology to its full potential (i.e., QuickBooks – get everything in there – catch up so we have a better idea of where we are)
- Look at ADLware – more training
- Melissa and Connie need more training with it
- Outsource payroll
- Delegate and communicate better
- Look at our business structure so everyone knows everyone else's role

TASK #2:

- Go after larger accounts – create more relationships (i.e., DWP and concentrate more on outreach, HR managers, etc) to push the services we have
- By March 1st

SOME STEPS:

- Toastmasters
- Set time / schedule to do it



TASK SUMMARY

NAME/POSITION:

MELISSA

STRENGTHS:

- Creating new ideas
- Able to identify problems and find solutions
- Have huge connections with big organizations

AREAS FOR IMPROVEMENT:

- Spending more time in High Payoff Activities – rather than always taking care of the mess
- I'm the one constantly saving the day, making sure everything is running smoothly
- Our people see I'm an over-achiever and look up to me

OBJECTIVE:

- Will have more time to create more stuff / passive income
- Not always be in the office dealing with daily tasks

TASK #1:

- Get Online Academy and App Running
- By June 1st

SOME STEPS:

- Make sure staff knows what they need to do
- Find web designer
- Get podcasting equipment ready
- Get marketing and capital

TASK #2:

- Grow company to Hawaii
- By September 1st

SOME STEPS:

- Get LLC and business permits through the State of Hawaii
- Identify staff and location
- Marketing and get capital