

MANAGERS: What do you want for your outfit?

Picture yourself in the next phase of your business's future. Envision what you want for your outfit in three distinct stages: 1) This coming year, 2) Next year, and 3) 3+ years from now.

What are you doing? Why are you doing it? Who else is involved? How will things be better?

Write down your answers:

1. This year:

2. Next year:

3. 3+ years from now:

If you've got writer's block, here are some prompts to get your visions flowing:

What are YOU doing for the business? What is your role?

How often are you working or not working?

What does your team look like? (Size, roles, etc.)

How many team members do you supervise and what are their roles?

Who are your target customers? What motivates them to come to your business?

Do you oversee just one or multiple locations?

What are your annual sales numbers?

What is your take-home pay?

How much cash is in the business's bank account?

Think about your next career move. What does a successful transition look like to you?

OWNERS: What do you want for your outfit?

Picture yourself in the next phase of your business's future. Envision what you want for your outfit in three distinct stages: 1) This year, 2) 2-5 years from now, and 3) 6-10 years from now.

What are you doing? Why are you doing it? Who else is involved? How will things be better?

Write down your answers:

1. This year:

2. 2-5 years from now:

3. 6-10 years from now:

If you've got writer's block, here are some prompts to get your visions flowing:

What are YOU doing for the business? What is your role?

How often are you working or not working?

What does your team look like? (Size, roles, etc.)

How many managers are running things, and in what roles?

Who are your target customers? What motivates them to come to your business?

Do you have just one or multiple locations?

What are your annual sales numbers?

What is your take-home pay?

How much cash is in the bank?

Think about your exit. What does a successful departure look like to you?

MANAGERS: What do you want for your personal life?

Picture yourself in your future shoes for a moment. Envision what you want for your personal life in three distinct stages: 1) This coming year, 2) Next year, and 3) 3+ years from now.

What are you doing? Why are you doing it? Who else is involved? How much fun are you having?

Write down your answers:

1. This year:

2. Next year:

3. 3+ years from now:

If you've got writer's block, here are some prompts to get your visions flowing:

Who do you spend the majority of your time with? Why?

What makes you most excited to wake up every morning?

What is each year's accomplishment - big or small - that you want to tackle?

What big milestones do you crave? (Think relationships, education, purchases, etc.)

What keeps you up at night? What will you do to kick those fears to the curb?

Are you traveling? What experiences are you having?

Which rivers are you running? Which roadtrips are you taking?

How will you know you've arrived?

OWNERS: What do you want for your personal life?

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Are you traveling? What experiences are you having?

Which rivers are you running? Which roadtrips are you taking?

How will you know you've arrived?

What do you want for your outfit's finances?

Part I:

For both managers & owners, think about what you want for your outfit's finances for the following time periods: 1) This coming year, 2) Next year, and 3) 3+ years from now.

Write down your answers:

1. This year:

2. Next year:

3. 3+ years from now:

Part II:

Make a summarized list of your answers from the "Work Smart" tab (pp. 1-2) and Part I above. Then, write the ballpark costs needed to afford each item on your list.

The ways you'll have fun:	And the \$\$ needed to cover it:
<i>Example: Purchase a 2nd river property</i>	\$1.2 m

What do you want for your personal finances?

Part I:

For both managers & owners, think about what you want for your personal finances for the following time periods: 1) This coming year, 2) Next year, and 3) 3+ years from now.

Write down your answers:

1. This year:

2. Next year:

3. 3+ years from now:

Part II:

Make a summarized list of your answers from the “Have Fun” tab (pp. 3-4) and Part I above. Then, write the ballpark costs needed to afford each item on your list.

The ways you'll have fun:	And the \$\$ needed to cover it:
<i>Example: Pay off student loans</i>	\$25 k