

**2023 Client Goal Planning and 2022 Review**

**Please have completed and bring copies to our January 2023 Coaching Session**

**One Word Exercise**

|  |  |  |
| --- | --- | --- |
|  | One word that describes me today? (2022) | How I want to be described? |
| Leader |  |  |
| Businessperson |  |  |
| Boss/Manager |  |  |
| Professional Colleague |  |  |
| Spouse |  |  |
| Parent |  |  |
| Sibling |  |  |
| Friend |  |  |

**PERSONAL REFLECTION QUESTION**

What are you most passionate about doing right now?

What are you doing that no longer fulfills you?

What are you most proud of having accomplished up to now?

What is your life’s purpose?

What contributes / what doesn’t contribute to you being the person you’d like to be?

What are doing just for you?

How would you like to learn/grow as a person?

What would you do if you knew with certainty that you were financially independent for the rest of your life?

What, other than money and material possessions, is important to your sense of security?

How have you “kept score” until now?

How much longer do you want to keep using the same scorecard?

What is your vision, your dream of your future?

What concerns do you have as you look at your future?

When all is said and done, what would you like your legacy to be?

How would you like to be a different person five years from now?

What threatens your peace? Your career? Your health? Your personal fulfillment?

What conversations are you avoiding right now? Why?

Do you have your personal priorities in the right order? Are the key people in your life happy with your level of commitment to them?

What one personal relationship deserves more of my attention in 2023? How are you going to make this happen

What one thing will you stop doing in the next 12 months that will reduce your stress and increase your happiness?

What one thing will you start doing in the next 12 months that will reduce your stress and increase your happiness?

**Please Rate Your 8 Basic Life Areas (1-10 with 1 being failing and 10 being fully content):**

|  |  |  |
| --- | --- | --- |
| **Area** | **Importance to You (1-10)** | **Current Rating (1-10)** |
| Work |  |  |
| Money |  |  |
| Family |  |  |
| Personal Growth |  |  |
| Health |  |  |
| Community Involvement |  |  |
| Friendships/Social Life |  |  |
| Spiritual |  |  |

In which Life are would you like to most improve in 2023? What area would your spouse/significant other/close friend say is an area you should work on in 2023?

**Personal Data**

Are you satisfied with your regular diet? \_\_\_\_\_\_ Yes \_\_\_\_\_ No

Do you exercise at least three times a week – 30 minutes each time? \_\_\_\_Yes \_\_\_\_ No.

How would you rate your current health on a scale of 1-10 (10 high) \_\_\_

When was your last physical? \_\_\_\_\_\_\_\_\_\_\_\_\_\_ months ago.

Current weight \_\_\_\_ Goal weight \_\_\_\_\_\_\_

Last Vacation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ How Long? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next Vacation \_\_\_\_\_\_\_\_\_\_\_\_\_\_ How Long? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have a Will and other estate plans to protect your family? If yes, how current is the information? If not, what’s the obstacle?

**BUSINESS:**

**2022 Business GPA Rankings (Please use letter grades and provide an explanation)**

* Growing Revenue from New Customers
* Maximizing Revenue from Existing Customers
* Managing Operations Effectively to Maximize the Bottom Line
* Creating a Work Environment That Attracts and Retains Talent
* Consistently Meeting or Exceeding Customer Expectations
* Creating A Culture of Innovation Throughout the Company

**High Level Business Results:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **2022 Plan** | **2022 Actual** | **2022 Variance** | **2023 Plan** |
| Sales/ Revenues |  |  |  |  |
| # of Employees |  |  |  |  |
| Sales/Revenue per Employee |  |  |  |  |
| Cost of Goods Sold/Cost of Sales % |  |  |  |  |
| Gross Profit % |  |  |  |  |
| Pre-tax Profits |  |  |  |  |

What do you feel were YOUR most significant accomplishments (personal and/or professional) in 2022?

What do you feel were Your Company’s/Companies’ most significant accomplishments in 2022?

What do you feel were YOUR most significant disappointments (personal and/or professional) in 2022?

What do you feel were Your Company’s/Companies’ most significant disappointments in 2022?

What is the most helpful thing you could tell us about the current state of your organization?

# If you were competing against your company, what would you do?

What has become clear about your business and/or life over the past year?

**Key Performance Indicators for my business**

**(Besides high-level business results above):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Key Performance Indicator (KPI) | 2022 Target | 2022 Actual | 2022 Variance  | 2023 Target |
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# What is the current cash position of the company? What is your financial runway?

# How much debt are your currently carrying? How well can the business service this existing debt?

# Do you plan on making any business acquisitions in the next 1-3 years? If so, how will you make this happen?

**CEO ROLES:**

How Are you performing against the following core CEO Roles?

* **Chief Strategist** – providing clear strategic direction for the company
* **Chief Team Builder** – placing the right key people in the right spots and having them interact in the right way
* **Chief Sales Officer** – ensuring the organization has a consistent and scalable sales system/process and helping to close BIG deals
* **Chief Accountability Officer** – ensuring there are systems and processes in place to hold departments and people accountable
* **Chief Culture Officer** – institutionalizing the core values throughout the company and serving as their role model
* **Chief Coach/Mentor** – doing a great job coaching and mentoring your direct reports and expecting the same of them

How can you put yourself in a leadership position where you feel you are creating the most value and enjoying what you are doing?

What one major step will I take this year that I consider “well outside my comfort zone?”

If you could find 5 more hours per week in your schedule, what would you spend it on and why?

If you had unlimited resources to invest in your business, what would you do with them? Why?

What is motivating you right now – either dissatisfaction with the status quo or excitement about the future? Why?

What decisions are you avoiding? What’s preventing you from making them?

What big strategic questions do you have about your business as you plan for 2022?

What’s the one thing you could do as business leader to make everything else easier or unnecessary in your company?

Let us look at what you would deem to be a “normal” week for you. Dealing strictly with work related matters, how do you honestly now spend your time – by percentage – in the following categories:

* + Administration \_\_\_\_\_%
	+ Operational \_\_\_\_\_%
	+ Sales/Marketing \_\_\_\_\_%
	+ Payables, Cheque Signing, Receivables \_\_\_\_\_%
	+ Putting Out Fires \_\_\_\_\_%
	+ CEO Strategic Thinking or Planning \_\_\_\_\_%
	+ Other (Describe) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_%

What would your ideal work week time allocation look like?

* + Administration \_\_\_\_\_%
	+ Operational \_\_\_\_\_%
	+ Sales/Marketing \_\_\_\_\_%
	+ Payables, Cheque Signing, Receivables \_\_\_\_\_%
	+ Putting Out Fires \_\_\_\_\_%
	+ CEO Strategic Thinking or Planning \_\_\_\_\_%
	+ Other (Describe) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_%

What’s the biggest obstacle to living your ideal work week on a consistent basis?

In your leadership category of things you do each month, please prioritize (rank 1-8) the following important seven identified tasks:

Setting the vision and strategic direction of the company #\_\_\_\_.

Creating strategic alliances. # \_\_\_\_

Developing new products or services. # \_\_\_\_

Staying in touch with customers. # \_\_\_\_

Staying in touch with suppliers. # \_\_\_\_

Managing the balance sheet. #\_\_\_\_

Developing the culture. # \_\_\_\_

Other (Describe) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. #\_\_\_\_

**Leadership Team**

Rate your management team as a group, on a scale of 1 to 10 (10 is high).

\_\_\_\_\_ (Out of 10)

In the senior management category, what would be the points for the lowest ranked manager?

\_\_\_\_\_ (Out of 10)

What is one major strength and one major weakness of your management team?

Strength \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Weakness \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Do you have the right team around you to execute on your business vision for the next 1-3 years? If not, what are you doing about it?

What performance conversations are you avoiding right now? Why?

Are you grooming a successor? \_\_\_ Yes \_\_\_\_ No

Do you hold one to ones with your direct reports?

\_\_\_\_\_ Yes \_\_\_\_\_\_ No

How often? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How much personal retreat or “thinking space” do you allow yourself?

Daily \_\_\_\_\_\_ Weekly \_\_\_\_\_\_\_

Monthly \_\_\_\_\_\_\_ Annually \_\_\_\_\_\_\_ As required \_\_\_\_\_\_\_

I have delegated:

All I need to \_\_\_\_\_\_\_\_\_

Only \_\_\_\_ % of what I need and could delegate.

**The “let’s-be-honest” section:**

* + Do you have fun at your job? \_\_\_\_ Yes \_\_\_\_No \_\_\_\_\_Sometimes
	+ Are your people happy? \_\_\_\_ Yes \_\_\_\_ No \_\_\_\_\_ Sometimes
	+ Are you preparing for the company’s future? \_\_\_\_ Yes \_\_\_\_ No
	+ Is it up to you to provide the answers? \_\_\_\_ Yes \_\_\_\_ No \_\_\_\_ Mostly
	+ Do you demand enough from your people? \_\_\_\_ Yes \_\_\_\_ No
	+ Do you have a staff development plan? \_\_\_\_ Yes \_\_\_\_ No \_\_\_ Partial
	+ Management meetings are held? \_\_ Too few \_\_ Too often \_\_ Just right
	+ Staff meetings are held? \_\_ Too few \_\_ Too often \_\_ Just right
	+ Is the company’s overall compensation plan satisfactory? \_\_Yes \_\_ No
	+ Do you employ people you know you should terminate? \_\_ Yes \_\_ No
	+ Do employees feel free to criticize you, if needed? \_\_\_ Yes \_\_\_ No
	+ Does your style of leadership create any impediments to the success of your organization? If so, what is it?

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Of the following, the part of the job I love the most and the part I like the least are:

Favorite Least Favorite

Creating deals \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Negotiating \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dealing with customers \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Financial planning \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Product development \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

People management \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Selling \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Analyzing \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Dealing with The Current Economic Environment (also see Contingency Planning Worksheet)

What did you experience in the last downturn in your business? What was going on in the economy? How did it affect you? How did you handle it? In hindsight, what would you have done differently?

# What’s your plan for navigating your area of the company through the current economic downturn?

What is the story you’d like to write about your business in 2023?

# Your Big Three

What are my Big Three focus areas as a leader in 2023?

1.
2.

**Exit Planning Question:**

# Until what age do you expect to work full time?

Do you have a natural successor(s)? And, if yes, how are you cultivating his/her skills? If no, what is your plan to find or grow someone into this role?

Exit strategy Yes No

Succession Plan Yes No

**My Business Contingency Planning Worksheet**

1. What is my plan to manage increased inflation in 2023?

2. What will we do if sales are flat this year?

…if sales decline by 20%?

…if sales decline by 30%?

3. What will do if sales accelerate unexpectedly?

…if they accelerate by 25% or more?

4. How will we react if accounts receivable collections slow by 10-20 days?

…by 30 days?

5. What will happen if lenders increase rates by 1%?

…if they increase rates by 2%?

6. How will we react if our biggest customer goes “belly up?”

7. What will we do if our competitors actively pursue our key accounts and top people?

1. How will we react if we find out that our product/service causes harm to our customers/clients?
2. What will we do if we find out that important information from our company has gotten into the hands of our competitors?
3. What will the business do if you as the leader are unwilling to work for any extended period of time?
4. What will the business do if the economy dips into a Recession?
5. Other than the above, what “worst case” scenario can you come up with, and how should we deal with it?

Scenario:

Solution:

**My Coaching Experience**

**Client Self-Evaluation**

1. **1-1/Triad Meetings:**

|  |  |
| --- | --- |
| **Criteria** | **Self-Ranking** |
| Scheduling |  |
| Preparation |  |
| Willingness to be Vulnerable/Share Real Concerns |  |
| Openness to Feedback |  |
| Depth of Issues Discussed |  |
| Following-Up on Acting Items |  |
| **Overall Ranking** |  |

What is an "unspoken truth" about your company?

What my Coach can do better to help me get the most out of my coaching experience

What I can do better to get the most out of my coaching experience:

What one thing am I afraid/worried to talk about in my coaching sessions?



**2023 Primary Goals**

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

**“Smart” Goals are:** Specific, Measurable, Attainable, Realistic, Timely

# What are your 4 primary business goals?

|  |  |  |
| --- | --- | --- |
| **Goal** | **Metric:****How will you measure success?** | **Timeframe Completed by:** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**What are your 4 primary personal goals?**

|  |  |  |
| --- | --- | --- |
| **Goal** | **Metric:****How will you measure success?** | **Timeframe Completed by:** |
|  |  |  |
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