**VISTAGE 2024 REFLECTION AND**

**2025 GOAL PLANNING DOCUMENT**

**CE and SB MEMBERS**



**PLEASE HAVE THIS COMPLETED AND READY TO BE PRESENTED BY THE JANUARY 2025 GROUP MEETING**

**BUSINESS SECTION**

What overall score would you give your business leadership performance on a scale of 1-100? Please explain.

What were some of your big business accomplishments in 2024? Why did they happen?

What were some of your major business disappointments in 2024? Why did they happen?

What were the biggest business surprises in 2024? Why did they happen?

What successful changes did you make in 2024? What impact did they have?

What assumptions do you have about your industry, market, or business that is influencing your leadership thinking for 2025?

What one thing, if it happened in your business in 2025, would make everything easier or unnecessary?

What business relationship is your top priority in 2025? Why and what are you going to do about it?

How would you rate the overall performance of your leadership team in 2024? How good of a job did you do leading them to success?

Please rate each individual member of your leadership team:

| **Team Member** | **Position** | **Rating (1-10)** | **Strengths** | **Weaknesses** |
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Do you need to make any changes to your leadership team? If so, what, who and why?

Where are you most vulnerable from a leadership team perspective? What do you need to do about this?

What are you doing now to grow the capabilities of your leadership team? What are your plans for 2025?

Business GPA Results for 2024 (please provide letter grade and explanation):

| **Category** | **Letter**  **Grade** | **Explanation** |
| --- | --- | --- |
| Grow revenue from new customers. |  |  |
| Maximize revenue from existing customers. |  |  |
| Manage operations effectively to maximize the bottom line. |  |  |
| Create a work environment that attracts and retains talent. |  |  |
| Consistently meet (then exceed) customer expectations. |  |  |
| Manage business risk proactively. |  |  |
| Create an environment of continuous improvement in all that you do. |  |  |

Which of these categories will be your top business priority in 2025? Why?

How much time do you estimate you spend on your CEO role (not doing others' work)? Is this sufficient to do the job well?

Please Rate yourself in terms of your performance in the following roles (please provide letter grade and explanation):

* **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

| **Role** | **Letter Grade** | **Explanation** |
| --- | --- | --- |
| Chief Strategy Officer |  |  |
| Chief Team Builder |  |  |
| Chief Sales Officer |  |  |
| Chief Accountability Officer |  |  |
| Chief Culture Officer |  |  |
| Chief Coach Mentor |  |  |

Which of these CEO roles will be your top business priority in 2025? Why?

What were your business results for 2024?

| **Category** | **2024 Target (Budget)** | **Actual** | **Variance (difference)** |
| --- | --- | --- | --- |
| Revenue |  |  |  |
| Cost of Goods Sold/Cost of Sales % |  |  |  |
| Gross Profit |  |  |  |
| Direct Labor % |  |  |  |
| SG&A (Overhead %) |  |  |  |
| EBITDA |  |  |  |
| Net Profit |  |  |  |
| Cash Flow |  |  |  |
| Current Ratio |  |  |  |
| Working Capital $ |  |  |  |
| Inventory Turns |  |  |  |
| Sales Pipeline |  |  |  |
| Close Rate % |  |  |  |
| Customer Acquisition Cost |  |  |  |
| Work Backlog |  |  |  |
| Sales Per Employee |  |  |  |
| Total Cost Per Employee |  |  |  |
| Employee Turnover % |  |  |  |
| Customer Retention % |  |  |  |
| Average Sale/Transaction |  |  |  |

Please rate the following functional areas of your business (on a scale of 1-10); n/a if not relevant:

| **Functional Area** | **Rating (1-100)** | **Explanation** |
| --- | --- | --- |
| Accounting/Finance |  |  |
| Business Development/Sales |  |  |
| Customer Service |  |  |
| Human Resources |  |  |
| Information Technology |  |  |
| Legal |  |  |
| Marketing |  |  |
| Operations |  |  |
| Purchasing |  |  |
| Warehouse/Inventory Management |  |  |

What is your biggest weakness in terms of functional expertise? How are you planning on addressing this in 2025?

What would you estimate as the current value of your business?

What would you like the value to be at the end of 2025?

What big decisions do you need to make for this to happen?

What major actions do you need to take for this to happen?

Do you have a succession plan in place should something happen to you or another Key Executive? If yes, please explain. If no, what can you do about this in 2025?

Do you have an Exit Plan and timeline? If yes, please explain. If no, what do you need to do about this in 2025?

Where do you want to grow as a leader in 2025?

Please describe your approach to budgeting for 2025. What assumptions are driving your targets? Are you confident in your plan?

What are your business targets for 2025?

| **Category** | **Target (Budget)** |
| --- | --- |
| Revenue |  |
| Gross Profit |  |
| Cost of Goods Sold/Cost of Sales % |  |
| Direct Labor % |  |
| SG&A (Overhead %) |  |
| EBITDA |  |
| Net Profit |  |
| Cash Flow |  |
| Current Ratio |  |
| Working Capital $ |  |
| Inventory Turns |  |
| Sales Pipeline |  |
| Close Rate % |  |
| Customer Acquisition Cost |  |
| Work Backlog |  |
| Sales Per Employee |  |
| Total Cost Per Employee |  |
| Employee Turnover % |  |
| Customer Retention % |  |
| Average Sale/Transaction |  |

What are some other Key Performance Indicators (KPIs) relative to your industry that are important to you that we should know about and should be tracking:

| **KPI** | **Target** |
| --- | --- |
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**Ken Stibler Employee Clarity Questions (please answer):**

* This is where we are going in 2025…
* This is who is going with us…
* This is why are we going there…
* This is what you can expect from us…
* This is how we are going to get there…

**What are your top 5 Business Goals for 2025?**



In two paragraphs, please describe what you want to be saying about your business at the end of 2025:

**PERSONAL SECTION:**

What overall score would you give your personal life on a scale of 1-100? Please explain.

What were some of your biggest personal accomplishments in 2024? Why did they happen?

What were some of your major personal disappointments in 2024? Why did they happen?

What were the biggest personal surprises in 2024? Why?

What successful changes did you make personally in 2024? What impact did they have?

What one thing, if it happened in your personal life in 2025, would make everything easier or unnecessary?

What do you need to let go off? What’s a weight that needs to be lifted?

What personal relationship is your top priority in 2025? Why and what are you going to do about it?

How much longer do you plan on working full-time? Is there a targeted retirement date?

Please rate your personal life across the following Categories:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Category** | **Importance to Your (1-10)** | **Performance Rating for 2024? (1-10)** | **Priority for 2025 (please put in rank order** | **Comments** |
| Family – Spouse/Significant Other |  |  |  |  |
| Family – Children |  |  |  |  |
| Family – Extended |  |  |  |  |
| Friendships |  |  |  |  |
| Health – Diet |  |  |  |  |
| Health – Exercise |  |  |  |  |
| Spiritual |  |  |  |  |
| Personal Finance |  |  |  |  |
| Vacation/Travel |  |  |  |  |
| Hobbies |  |  |  |  |
| Community Involvement |  |  |  |  |
| Philanthropy |  |  |  |  |
| Personal Growth |  |  |  |  |

How frequently do your spouse/significant other and you have a date night (just the two of you)? Is this frequent enough to maintain the connection? Who is responsible for getting this on the calendar?

When was the last vacation you took just with your spouse/significant other? When is the next one?

Do you spend enough one-to-one time with your kids? Is this evenly balanced? Is there a child (or grandchild) you would like to spend more time with? How can you make this happen?

When was the date of your last family vacation? When is the next one?

When was the date of your last medical physical? Are there any problem areas for which we can hold you accountable?

What is your approach to stress management? Is it working?

How often do you exercise, and for how long? What are your workout priorities?

What is the last thing you did just for you? Do you have anything scheduled like this for 2025?

Is there a friendship you’d like to prioritize in 2025?

Do you have a formal personal financial plan? If yes, how are you tracking against it?

Is there anything you’d like to learn for personal growth in 2025? What do you need to do to make this happen?

In two paragraphs, please describe what you want to be saying about your personal life at the end of 2025:

**What are your top 5 Personal Goals for 2025?**



**VISTAGE SECTION**

How would you rate your participation/commitment as a Vistage member (on a scale of 1-100)? Please explain.

| **Category** | **Rating(1-100)** | **Explanation** |
| --- | --- | --- |
| Group Meetings |  |  |
| Triads/1-1s |  |  |
| Group Retreat |  |  |
| Vistage Networks |  |  |
| Use of Other Vistage Online Resources |  |  |
| Networking/Relationship Building with colleagues |  |  |

What strengths do you feel you bring to the group?

What improvements do you need to make as a member for the good of the group?

When was the last time you processed an issue with your group? What were the results?

Did you host a meeting in 2024? If yes, what were your major takeaways from that experience?

Who was your favorite speaker over the past year, and did you apply anything from their talk?

Have you participated in any of the Vistage webinars over the past year? If yes, what value did you take from them?

Are you participating in any of the Vistage Network Groups? If yes, how has this been

helpful?

Where do you get the most value from your Vistage experience?

What would improve your Vistage experience?

Other comments/feedback?