

Our Level 3 Road Map

Our Vision

Why we do what we do...

Our Mission

What we really do for our clients...

Our Values

At _____, we believe deeply in:

Our Driving Ambition

The single goal our team is dedicated to achieving...

By _____, we have...

Tangible Images of Success

The personal payoffs we envision when we accomplish our driving ambition.

- ---
- ---
- ---
- ---
- ---
- ---
- ---
- ---

Our Brand Promise:

Our Top 3 Brand Emotions:

1.

2.

3.

Our Brand Defining Products

**MAUI
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The Business Owners Community

888-889-0944

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	Q1			Q2		
Financial Drivers:	Target	Actual	△%	Target	Actual	△%
Gross Sales (\$)						
Gross Profit (\$)						
Gross Margin (%)						
Operating Profit (\$)						
Operating Margin (%)						
Key Performance Indicators						
KPI #1						
KPI #2						
KPI #3						

Top 5 Business Strengths: 1. _____ 2. _____ 3. _____ 4. _____ 5. _____	5 Biggest Business Obstacles: 1. _____ 2. _____ 3. _____ 4. _____ 5. _____
3 Greatest Business Opportunities: 1. _____ 2. _____ 3. _____	3 Greatest Business Threats: 1. _____ 2. _____ 3. _____

"Planning for tomorrow means sloughing off yesterday. Before you do something new, you have to stop doing something old." ~Peter Drucker

Based on what you know today, what activities or initiatives should you...

Reduce?	Discontinue?	Phase Out?	Avoid All Together?
• _____	• _____	• _____	• _____
• _____	• _____	• _____	• _____
• _____	• _____	• _____	• _____
• _____	• _____	• _____	• _____
• _____	• _____	• _____	• _____
• _____	• _____	• _____	• _____
• _____	• _____	• _____	• _____

Q3			Q4			ANNUAL		
Target	Actual	△%	Target	Actual	△%	Target	Actual	△%

The 5 Capabilities We Most Need to Develop:

1. _____
2. _____
3. _____
4. _____
5. _____

Our Business Strategy:

From a high level view, how will we accomplish our Driving Ambition?

Our Top 3 Strategic Targets for _____ (year)

1. _____

2. _____

3. _____

Q1
Focus

Q2
Focus

Q3
Focus

Q4
Focus

My Business: The Six Quarterly Commitments

Single Unacceptable to Change

Action Step

By

☐ Q1

☐ Q2

☐ Q3

☐ Q4

Major Decisions to Make

Action Step

By

☐ Q1

☐ Q2

☐ Q3

☐ Q4

Key Stop Doing List Item

Action Step

By

☐ Q1

☐ Q2

☐ Q3

☐ Q4

Key Relationship to Cultivate

Action Step

By

☐ Q1

☐ Q2

☐ Q3

☐ Q4

New Capacity to Develop

Action Step

By

☐ Q1

☐ Q2

☐ Q3

☐ Q4

Swing for the Fences Opportunity to Pursue

Action Step

By

☐ Q1

☐ Q2

☐ Q3

☐ Q4