

Vision Planning Worksheet

In order to fully step into your future,
You must clearly understand where you've come from,
And where you're at...

**STEP 1: Make a copy before starting (go to “file”
and then to “make a copy”)**

STEP 2: Name new file

**STEP 3: Share the file with team members (if it's a
collaborative doc)**

STEP 4: Delete these instructions

Links:

Here's a workshop I hosted on this that might help you walk through the considerations as you fill this out:

[Vision Planning Workshop Tutorial](#)

Looking Back & Reflecting

Celebrate your wins.

Great success is built upon the accumulation of small, incremental successes, consistently made over time.

List what you've accomplished in the recent year's activity

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-

What did these wins teach you?

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-
-

In what ways have you changed personally in the recent year?

-
-
-

Looking ahead:

What is your vision of **functional prosperity**?

What does your ideal work-life balance look like?

(Bear in mind that this is where you would like to end up, and that it may take some time for your business to mature to arrive at this)

How many hours per day would you like to work?

How many days per week?

What hours during the day?

What days of the week?

How much time would you allot per year for downtime, retreats, travel, etc...?

How do you want to feel after a day of work within your ideal work-life balance?

What else? Aside from the above questions, what does your vision of success look like?

(both figuratively and literally...what would it look like visually and also what would your life in general look like)

Engaging your senses, what would be some sounds, smells, tastes and tactile sensations that might connect to your vision of success?

For example:

Do you smell the fresh oxygen-rich forest air of a home in the woods?


Do you hear the sound of the wind through the trees and the songs of the birds at your dream home?

Do you taste your favorite homemade dish, or a dish at your favorite restaurant, or at an exotic place you will travel to?

Do you feel the texture of organic cotton clothing or other natural materials on your skin? Do you feel your feet in the sand at a place you would like to visit or live?

Lifestyle Requirements & Visions

You can use this worksheet to support your work in this section. Reach out to Bill Hershey for a strategy session on how to use this template: info@lifestreambusiness.com

 Reverse Engineer Your Pricing - SERVICE MODEL TEMPLATE 2023

What are your basic survival needs (personal) and monthly/annual expenses? (list as many as you can think of along with estimated amounts for each)

With this in mind, how much do you need to make (roughly) in a month to survive? (we'll call this **minimum survival income**)

What does a financially **comfortable** lifestyle look like for you? What expenses and activities help you to feel satisfaction in life? (list as many as you can think of with estimated amounts)

Based on the information from the previous question, how much do you need to make in a month (roughly) to support this financially **comfortable lifestyle**?

How would your life look if you were not limited by money? (We'll call this the “**expansive**” **lifestyle**) What activities would you pursue that you may not be able to currently afford? (list as many as you can think of along with estimated amounts)

Based on the information from the previous question, how much do you need to make in a month (roughly) to support this financially **expansive lifestyle**?

Big Business Questions*

**These questions are drawn from Warren Berger's A More Beautiful Question (p140 - 147) with permission from author to cite*

What is your business's purpose here on earth?

Is your business merely a means to a paycheck, or is there more behind its reason for existing? Notice the difference between how you answer this question and what is your purpose here on earth. If there is a difference - what's different?

Whom must you and your business fearlessly become?

This question will challenge you to envision a version of your business that does not currently exist (or a version of yourself that is not currently manifest).

What is true about your business at its core?

Having a clear answer to this question will help you navigate major challenges and changes your business may face. A business that has clarity around its identity and purpose has a much easier time answering the deceptively simple question of “what business are we in now?”

What if your business did not exist? Who would miss it most?

This question will challenge you to approach your business with a beginner's mind. It invites you to let go of the history of your company and everything you've invested into it. The second part of the question helps you clarify who your ideal clients are, and also nudges you toward your business's core purpose.

What should you stop doing in your business?

No one likes "killing their darlings" (a somewhat harsh metaphor often used by writers when editing, when referring to their cherished ideas and thought creations). But the above questions might help you clarify what aspects of your business are supporting your core purpose and which are not. What aspects of your business are not supporting your core purpose. Note that if you cannot identify what you should stop doing, it either means your business is fully aligned with your core business purpose or (perhaps more likely) it could be an early warning sign that your core purpose and strategy lacks clarity and definition.

What is your mission statement?

Using the answers to these questions, come up with a working version of your mission statement encapsulating the purpose, core values and types of impacts your business is here to make.

What is your vision statement?

Now come up with a working version of your vision statement, which in contrast from your mission statement, will more specifically articulate your company's ideal impact on the world in a projection of a 5-10 years into the future.

What could your business look like in 10 years?

Take a moment to visualize what you could imagine your business being like in 10 years, then 3 years, and then 1 year.

- *What services would you offer?*
- *Would you be in person, virtual or both?*
- *Would you be working locally, nationally, internationally?*
- *What would your team look like (if any)?*
 - *Would you have employees or contractors?*
 - *What roles would they play?*

- *Approximately how many?*
- *How much “topline” revenue would your business be generating (i.e. before expenses)?*
- *How much would you be earning in take home pay?*

10 year goals (if this is too difficult to imagine, go straight to 3 year goal)

Services

-
-

Location

Team

-
-

Other relevant details

Revenue

\$_____

Take Home Pay

\$_____

3 year goals

Services

-
-

Location

Other relevant details

Team

-
-

Revenue

\$_____

Take Home Pay

\$_____

1 year goals (the next 12 months)

Services

-
-

Location

Other relevant details

Team

-
-

Revenue

\$_____

Take Home Pay

\$_____

Flowers, Seeds, Weeds & Needs (aka SWOT Analysis)

Flowers (Strengths)

-

Needs (Weaknesses)

-

Seeds (Opportunities)

-

Weeds (Threats)

-

Strategic Remedies

Record main challenges and strategic activities for overcoming these challenges

Examples could relate to cash flow, work-life balance, marketing, location, staffing, business model, administration, systems, etc...

Challenge #1

ex/ increase cash flow

#1 Key Strategic Activities/Remedies

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-
-

Challenge #2

ex/ need more training to serve clients/patients more significantly

#2 Key Strategic Activities/Remedies

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-
-

Challenge #3

ex/ staffing issues

#3 Key Strategic Activities/Remedies

-
-
-

Challenge #4

ex/ update website

#4 Key Strategic Activities/Remedies

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-
-

Challenge #5

ex/ refresh marketing strategy

#5 Key Strategic Activities/Remedies

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-
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Key Challenge #6

ex/ working too many hours, burning out (needing to get into a better sleep rhythm)

#6 Key Strategic Activities/Remedies

-
-
-

Quarterly Objectives - Milestones

General rule: don't plan more than 3 major objectives in any given quarter (it can dilute your focus, and you risk not achieving any of them)

Q1

- 1.
- 2.
- 3.

Q2

- 1.
- 2.
- 3.

Q3

- 1.
- 2.
- 3.

Q4

- 1.
- 2.
- 3.