dynamite circle

Goals | Plans | Systems (GPS)

Your clear path to growth

*A note from Dan

This resource is a diagnostic tool, designed specifically to help you plan for business growth.

Through completing this worksheet, you will:

- *Discover key insights about the state of your business that you probably didn't realize before*
- *Define clear goals for your business moving forward*
- *Develop a plan based on your historical data and a cadence for tracking your progress regularly*

Want to get in the company of other entrepreneurs to help you kickstart your 2025 goals? Submit your application to join Dynamite Circle at https://dynamitecircle.com/ .

Sincerely,

Dan

Diagnostic: Your Business Today

Discover key insights about the state of your business that you probably didn't realize before

Company name/URL:
Founder(s) name:
Date:

Collect all core company documents. If you do not have these documents, it's okay. We will guide you through their creation based on your answers to the diagnostic. Our goal is to be *efficient* with your time, not to simply do work for the sake of it.

Core Company Documents:

1. P&L for current year and previous two
2. Revenue and Profit Projection (proforma)
3. Balance shee
4. Company plan or strategy
5. Scoreboard or dashboard of key company metrics

Initial Diagnostic Questions:

These questions are designed to help all stakeholders and advisors understand your unique historical narratives and data. We will use them to gain clarity, and determine strategic paths forward.

Finance & Data:

- What is your trailing 3 years of revenue?
- What is your gross profit for the previous year?
- What is your net profit (Adjust out owner compensation to market rate).
- What is your business worth? (90-day fire sale. Full 1-2 year exit.)
- What are your goals in terms of free cash flow annually or exit valuation?
- Do you have your customer acquisition funnel modeled or mapped? (If so please provide a link).
- Do you know: LTV/CAC Ratio / Labor Efficiency Ratio?

Personal:

- How many quality hours per day do you spend working on your business?

- What tasks do you love and/or hate doing in your business?
- Do you have any partners in the business? (Or key clients representing 25%+ of your revenue). If so, how would you describe the quality of that relationship? Would you have the same arrangement if you could start over today?
- Rate your stress level regarding non-business life and tasks. (Scale of 1-10)

Emotional:

- Do you have worries or stress associated with your business or the goals you're hoping to achieve?
- Do you have people you can speak with on a weekly basis that are supporting your efforts? If not, can you paint a sketch of who that person would be and how you would interact with them?
- How would you rate your energy and enthusiasm for your business in the past 90 days? (Scale of 1 to 10)

Strategy:

- What is your business's unfair advantage?
- Can you describe the market opportunity your business is pursuing?
- What is your best marketing channel and why?
- What does it take in energy or dollar terms to acquire a new customer?
- What is working best in your business right now?
- Describe your ideal customer profile (ICP). Do you have a reliable path to providing more value for them and acquiring more of them?
- What is your AOV and/or LTV?
- What do you think a 10/10 skill level entrepreneur would do with your business assuming the goal of unprecedented growth in the coming 12-24 months?

Plan:

- Describe the current constraint or bottleneck in your business.
- Do you have the right data to understand what to do next?
- Do you know what part of the customer journey you need to address first - awareness, conversion, or retention?
- How are you planning to hit your goals? What are the concrete steps that need to be taken?
- What is your 3-year plan? (Revenue + vision).

Executive:

There are 8 functions in most businesses. Divide your time allocation on each function by percentage:

1. Executive
2. Sales
3. Marketing
4. Operations
5. Customer Service
6. Technology
7. Finance
8. Human Resources

Team:

- Would you rehire your team right now if given the opportunity? Explain.
- Who are your direct weekly reports? What are their responsibilities?
- Do they have scorecards?
- What is the quality of your meetings and conversations with them? (Scale of 1-10)
- Who's your next hire and why?

Support within the DC:

- Additional areas you are looking for support in from the DC community and coaches?
- Topics I'd like to talk with others about:
- Areas I can help others with:

*Pause here

Great work! You've done a good chunk of the hard work already. I can't understate how valuable this part is for the coaching and mastermind process. Knowing exactly where you're at is crucial to setting realistic goals and making plans to achieve them.

If you could only do one thing from the diagnostic list, it would be your comprehensive P&L and proforma.

The two things you need to run a business is a proforma and a plan. In this next section, we'll build out your plan.

GPS: Your business's future

Define clear goals for your business moving forward, a plan based on your historical data, and a cadence for tracking your progress regularly.

Goals

Define 90 day / 1 year / 3 year goals.
Write them down. They should be measurable and based on accurate historical data.
Goals ideally will have a tight relationship with plans below and their key metrics.

Example:

90 day sales target = Company Scoreboard

1 year revenue & net profit target = Proforma or Revenue & Profit Projection
- Napkin Math template (simple)
- Revenue & Profit Projection (advanced)
- Revenue & Profit Projection (Subscriptions) (advanced)

3 year revenue target = (Napkin Math)

Build a bridge from goals to plans.

Plans

The key metrics of elective plans correlate to the goals above. We prioritize plans that are related to historical data and behaviors in the company vs. developing entirely new ideas. **Principle**: first maximize what's already working, i.e. "more" and "better" before "new." What type of plan has the most immediate impact?

"Good plans are Clear, Correctable, Data Informed, Measurable, Capitalized."

PRIORITY PLAN (90 DAYS)

Select type of plan: Select an option ▾

Current #:
Target #:

Key supporting metrics:

Description of plan:

Who Owns It (Link to Scorecard).

How will you resource it?

Is it sufficient to meet the 90 day target?

Projects (critical to unlock priority plan):

☐ -Hire new CFO in 30 days.
☐ -Re-negotiate deal with key supplier.

SECONDARY PLAN (90 DAYS)

Select type of plan: Select an option ▾

Current #:
Target #:

Key supporting metrics:

Description of plan:

Who Owns It (Link to Scorecard).

How will you resource it?

Is it sufficient to meet the 90 day target?

TERTIARY PLAN (90 DAYS)
Select type of plan: Select an option ▾
Current #: **Target #:** **Key supporting metrics:** **Description of plan:** **Who Owns It (<u>Link to Scorecard</u>).** **How will you resource it?** **Is it sufficient to meet the 90 day target?**

Systems

Our systems are a mix of exercises designed to give you a fresh perspective on your business and ease in operating it. We highly recommend that all businesses have at least the first three, and then build out more systems when appropriate.

Critical Systems: ● **Revenue & Profit Projection** (or napkin math will do) ● **Company Scoreboard** – To review with key team members progress on a weekly basis.

- **Scorecards –** Create scorecards for key team members and ensure they own key parts of goals or plans (Example Filled out).
- **Daily Huddle** – Execute quickly with transparency across the whole team

All Systems:

Accountability Chart / Annual Plan Draft / Company Metrics / Company Operating Rhythm / Company Scoreboard / Ideal Customer Profile / Individual Role Scorecard / Napkin Math / Revenue & Profit Projection (advanced)/ Revenue & Profit Projection (Subscriptions) (advanced) / Process Mapping / Quarterly Goals / Unique Value Prop / Vision, Mission & 3-year Plan / Daily Huddle

Training:

Quarterly Goals / Operating Rhythm / Accountability Chart / Health Metrics / Role Scorecard / Hiring Practices / Interview Scorecard / Onboarding / First 90 days / Competency Matrix and 1on1s / Change Management

Executive Tracking

Few systems are as powerful as accountability.

Just as you hold your team accountable through scorecards and operational rhythm, consider doing the same at the executive level through programs like [DC Accelerator](). Use these sessions to challenge your thinking, clarify your plans, and make progress consistently.

Date / Description	Goals	Your Current Plans.	1-10 How Are You Today	What progress did you make on your plans?	What's top of mind?	Projects and action items for next 30 days.
1:1 Coach						
April Mastermind						
May Mastermind						
June Mastermind						
1:1 Coach Reset						

To fill out this worksheet, go to "File" and click "Make a copy."