



Visioning Worksheet

Consider what your business will look like 5 years from now.

Describe the assets of the business, the equipment and machinery, vehicles etc, consider quantity, model, age, capability, etc.

Describe the premises you operate from, in some detail, including the interior equipment, fit-out, and furnishing. Do you own these premises or are you renting?



Describe your customers, and the work you are doing from. If there is a market segment you aspire to work in, or a customer you would like to attract to your business record their details here. Describe how you would like your customers to be interacting with you and your team.

Describe your team, with the use of an organisation chart if it helps. How many people are working for you? Are there any new roles, ones not existing at present? It may be a sales manager's position, operations manager or even a general manager. Describe your role in the business (5 years from now), how many hours will you be working?



Describe the sales and marketing activities that are taking place on a regular basis.

Describe the systems you have in place – the processes ensuring predictable and consistent outcomes are achieved even when key people, yourself included, are absent from the business.



And finally describe the financial state of the business, with reference to cash flow, debt, and your

Now consider the current state of your business, and what actions must be taken to take your business from where it is now, to where you would like it to be 5 years from now. (You may find it helpful to refer to the Business health Checklist.)

Actions

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____