



Planning - goals, aspirations & what matters most

Please take the time to answer these questions. They will help in preparing for when we meet to detail what your needs, goals and purpose are going forward. There are no wrong answers, only the way it is. Capture everything, write it down.

a) SELF

What are you most proud of? Why?		
What is your definition of success?		
What are the 4 things you live for, or can't live without?	Live for... or can't live without	Because...
	1. 2. 3. 4.	1. 2. 3. 4.
What do others say your strengths are?		
What do you stand for?		
When you are at your best, what are you doing?		
What gets you out of bed in the morning?		
What do you want to learn this year?		

What legacy are you creating for the next generation?	
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b) BUSINESS

What are the non-negotiables about your business?	
Why does the business exist? OR Why are you in business together?	
In 5 years' time what do you want the business to be achieving?	
In 5 years' time what TWO things will define whether you have succeeded or not?	
What resources does the business need to have available to succeed?	
What can your business be the 'best in the world' at? i.e. what is your unique value proposition?	
What drives your economic engine? i.e. what do you measure that tells you you are on track?	
What does the brand of your business look like and feel like?	
What can hold your business back, if you let it?	
What are the challenges in front of you?	
What can you lever from to drive your business forward?	
What are the opportunities in front of you?	