

Your business: crystal clear

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Start Here: Resist the urge to rush. Take your time. We'll build on this later, so make sure it's solid.

Step 1: Defining The Vision & Mission

- **Vision Statement (Your "Why"):**

- What impact do you want your business to make in the world?
- How do you want your business to be remembered?
- What motivates you to keep going even on tough days?
- *Examples:*
 - *Tesla: "To accelerate the world's transition to sustainable energy."*
 - *Nike: "To bring inspiration and innovation to every athlete in the world."*
 - *Patagonia: "We're in business to save our home planet."*

- **Mission Statement (Your 'How' and 'What')**

- What specific problem do you solve?
- Who do you serve?
- What is your unique approach or method?
- *Examples:*
 - *Google: "To organize the world's information and make it universally accessible and useful."*
 - *Starbucks: "To inspire and nurture the human spirit - one person, one cup, and one neighborhood at a time."*
 - *TED: "Spread ideas."*

Step 2. Outline The Top 5 Core Values

- **List 7-10 guiding principles** that define your company's culture and decision-making process. Then pick 5.
- Ask:
 - What values would you fire an employee over if consistently violated?
 - What values inspire your team to go above and beyond?
 - What values guide your client interactions and partnerships?

10-Year Target

- Where do you see your business in 10 years?
- How big do you want to grow (revenue, team size, market share)?
- What's the ultimate legacy you want your business to leave behind?

3-Year Picture

- What does your business look like in 3 years?
 - Revenue, profit, number of clients, team size.
 - Describe your ideal company culture and brand reputation.
- What major milestones must be achieved to stay on track for your 10-year target?

1-Year Plan

- What are the most important objectives to accomplish this year?
- What revenue and profit goals are realistic yet ambitious?
- What key initiatives will move the needle? (e.g., product launches, marketing strategies, hiring)
- What challenges or obstacles need to be addressed?

Next Steps

- **Prioritize:** List your top 3 priorities for the next 90 days.
- **Accountability:** Who is responsible for each priority?
- **Review:** How often will you revisit and adjust these goals? (Quarterly, Annually)

Pro Tip: Keep this document visible and revisit it regularly to ensure alignment and focus.

Way to go! Congrats!

You've just taken a huge step toward building a business with purpose and clarity. By defining your Vision, Mission, Core Values, and Strategic Plan, you've laid the foundation for a company that doesn't just survive but thrives with intentionality.

But...

Here's the catch...

A vision without action is just a dream. The next big hurdle? **Bringing this strategy to life.**

- **Communicating this vision** to your team?
- **Aligning daily decisions** with these long-term goals?
- **Aligning financial decisions** to fuel this vision without losing sleep over cash flow, taxes, or investments?

Don't Miss Out on the Next Piece of the Puzzle

Most business owners stop here and wonder why nothing changes. But those who succeed take the next step: **They build systems that bridge the gap between vision and reality.**

- What if you could confidently make financial decisions knowing they support both your personal & business mission?
- What if your daily operations flowed seamlessly from your core values?
- What if accountability was built-in and team members could self-correct?
- What if your money started to work for you—not the other way around?

If you're ready to move from clarity to execution, don't leave this vision on paper. Let's turn it into action.

I'd love to show you how. Because the best businesses don't just have a vision—they fund it, live it, and leave a legacy.

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