

**THE BUSINESS OWNER'S GPS SERIES**

# ***YOUR DESTINATION***



**Define Your Company's  
Vision for Profits and Fulfillment**

# **WORKBOOK**

VERSION 1

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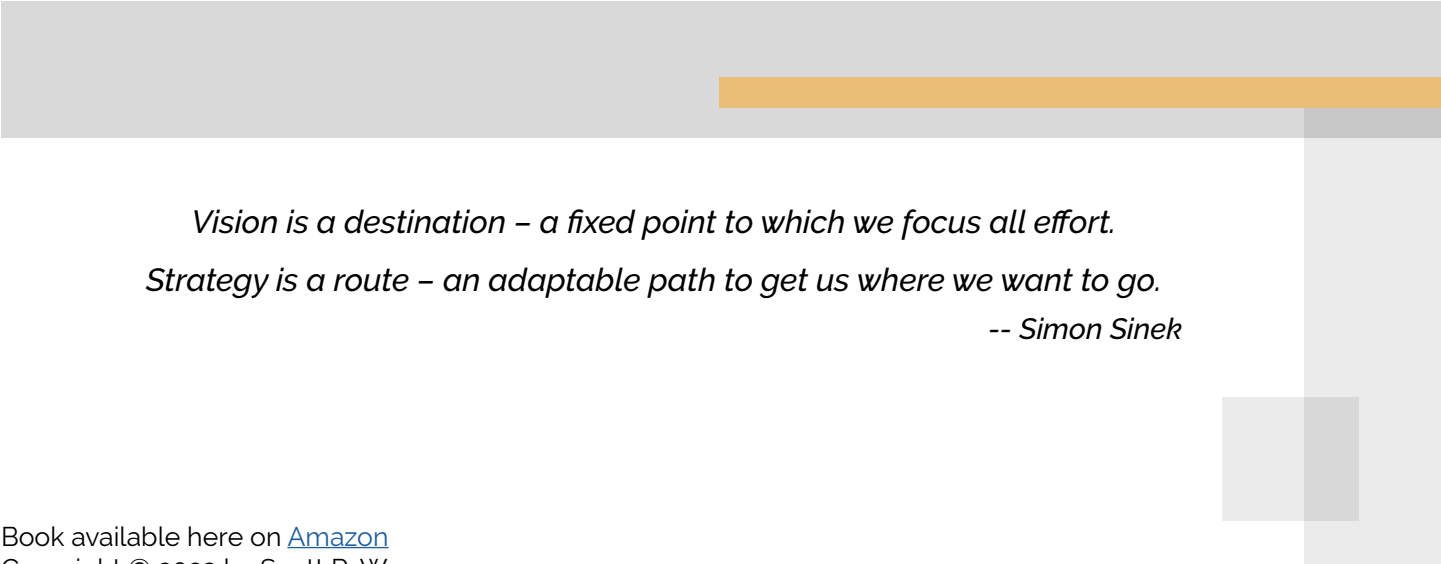
## DEFINE OUR COMPANY'S GPS DESTINATION

This workbook is the companion to the book "Your Destination – Define Your Company's Vision for Profits and Fulfillment". Please note that most of the details and instructions are in the book and not repeated here.

Creating a vision is easier than you might think. The purpose of this workbook is to help guide you through the steps to create your vision of the future and define your unique company's destination based on your business and life. Completing all the steps brings about the clarity you need to make proactive business changes to a better future. Your destination is summarized in Step #9 and you can print out those two pages to take everywhere or share. Each step is designed to take about a half-hour to an hour of your time. It is not expected that you finish this workbook in one sitting, but over a week or ago of duration to define your real vision.

Remember that the soft stuff drives the hard things. Your inner-vision, personal purpose, and values are part of the soft things, yet it steers you to tangible success in your company. Getting a crystal clear picture takes time to reflect and ask yourself what's really going on. Dig deep the whys before writing out your answers.

You got this!



*Vision is a destination – a fixed point to which we focus all effort.  
Strategy is a route – an adaptable path to get us where we want to go.  
-- Simon Sinek*

Book available here on [Amazon](#)  
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## ***Personal Side of Your Vision***

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### **STEP 1: ACHIEVE CLARITY**

Getting to clear and simple.

### **STEP 2: IDENTIFY YOUR VALUES**

What's really important to you?

### **STEP 3: CAPTURE YOUR ENTREPRENEURIAL DREAM**

Why are you doing this?

### **STEP 4: DECIDE ON YOUR TIME FRAME**

When do you want to arrive at the destination?

### **STEP 5: LIST YOUR DESIRES FOR YOUR FAMILY**

What are the results needed for freedom?.

## ***Business Side of Your Vision***

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### **STEP 6: CALCULATE YOUR FINANCIAL DESTINATION**

What finances are needed to get there?

### **STEP 7: BUILDING BLOCKS FOR VALUE CREATION**

What to build for your customers?

### **STEP 8: YOUR TEAM'S DESTINATION**

What roles and culture support the vision?

### **STEP 9: CREATE YOUR DESTINATION DOCUMENT**

Who are you going to share with?

# **9 Steps to Create Your GPS Destination**

## STEP 1 - ACHIEVE CLARITY

**Action 1: Carve out time. I have set aside the following time to achieve clarity.**

**Action 2: The place I have set aside is:**

**Action 3: During clarity time, I have reviewed this checklist to get started.**

- Reflected on your Season of Life.
- Reflected your company's stage of maturity.
- What excites you? What issues are you facing?
- Acknowledge the fear and uncertainty you are feeling.
- Is your pride in check?
- What are you seeing in your inner sight.?

**Action 4: What habits could I start to be proactive maintaining clarity?**

## **STEP 1 - ACHIEVE CLARITYT**

**What things I should be doing? What to say 'Yes' to?**

**What things am I obligated to do, but does not help get to my Destination?**

**What 'stuff' distracts me from my goals and vision? What things to say 'No' to?**

## STEP 2 - IDENTIFY YOUR GPS VALUES

**Circle the values important to you on the Idea List on the next page.** Take some time using methods from Chapter 2 to reflect on what is important to you and what motivates you. Be honest with yourself. Be who you are, not what your title is or what others want you to be. Capture your thoughts below.

**Top Personal Values** (list the top 5)

**Top Business Values** (list the top 5)

**Do the personal values and business values mostly agree? Why or why not?**

# Idea List for Values

*Note: List is in no particular order. When it comes to values no list is complete. Feel free to add your own.*

Personal Values	Business Values
Integrity / Loyalty / Honor	Growth / Grow or Die
Family / Friends	Increase Profits and Margins
God / Spirituality / Faith	Excellence / Integrity / Do the Right Thing
Health / Right Living / Inner Peace	Speed / Win
Competitive / Winning	Work Life Balance / Empathy
Freedom / Gratitude	Serve People and Community
Security / Harmony / Balance	Focused / Execution
Learning / Curiosity	Persistent / Competent
Personal Growth	Positive / Respectful / Optimism
Relationships / Friendships	Reputation / Transparency
Authority / Autonomy	Fact-Based Decisions
Being recognized / Reputation	Merit / Competitive
Adventure / Exploring	Teamwork / Cooperation
Creativity / Inventive	Great Leadership and Management
Achievement / Being Right / Leadership	Ownership / Responsible
Tradition / Service	Customer First / Voice of the Customer
Responsibility / Loyalty	Contribution / Exceed Expectations
Providing for Others	Creative / Wow Factor / Outlandish
Diversity / Caring / Fairness	Innovation / Entrepreneur
Consistency / Right Thinking	Collaborative / Open to Ideas / Speak Your Mind
Winning/ Success	Trust / Mentorship
Serving Others	Impactful / Innovative
Pleasure / Enjoying Life	Adaptive / Embrace Change / Be the Change
Community / Justice / Wisdom	Fun / Casual Workplace
Challenges / Resilience	Goal-Oriented / We Meet Our Goals
Wealthy / Status	Inclusiveness / Family-Like / Safe-Place
Happiness / Fun / Humor	Quality / Safety / Efficient / Agile
Looking Good in Front of Others / Fame	Dependable / Do What You Say
Self-reliance / Determination	Clarity in Communication

## STEP 3 - (RE)CAPTURE YOUR ENTREPRENEURIAL DREAM

### What is your dream as seen through your inner sight.

What is your definition of success?

What do you desire when you reach your GPS destination?

What does a better tomorrow look like in your world?

### Here is a short list of dig-deep questions (okay to add your own).

What were the reasons for starting your own business?

What does today's hopes and desires look like?

What does more freedom in your life look like?

What roles do family, free time, money, and happiness have in your entrepreneurial dream?

When you look at your business, what do you hope and desire?

Is it more revenues and income?

If you desire more revenues, what does more revenues look like? What do they buy?

## **STEP 3 - (RE)CAPTURE YOUR ENTREPRENEURIAL DREAM**

**Make a list of the top-5 things you want for a better tomorrow.**

1.

2.

3.

4.

5.

**Summarize your Business dream as your intuition or gut feeling is telling you?**

**Double check: Does your top-5 things of what you want match your top-5 values?**

## STEP 4 - DECIDE ON YOUR TIME FRAME

**Think over what a suitable date for you would be?** Jot down some considerations

**I intend to reach my vision destination by:** (exact date, like Dec. 31, 2029)

**I intend to share my date with team and family by:**

## EXTRA PAGE FOR NOTES AND THOUGHTS

*What can you do today to move towards your dream? --Michael Hyatt author*

## STEP 5 - LIST YOUR DESIRES FOR YOUR FAMILY

### What is your desired relationship between business and family?

*Separate:* Business is business and family is family.

*Combined:* My business is the family business or my spouse is a partner.

*Hybrid:* Sometimes a family member or spouse helps, but it is not a family business.

### Regarding your personal freedom desires, here are a few things to consider:

*Time in the business* - When the company is mature, do you want to work a day or two a week or you rather enjoy staying in the day-to-day activities?

*Taking downtime* - What things do you do to unwind? What is your hobby or sports activity? How often do you hang with friends or have solitude time?

*Staying healthy* - A healthy body is important to your freedom. What activities do you do to stay in shape and stay in good mental and spiritual condition?

*What is unique to you?* - What things should be considered?

## STEP 5 - LIST YOUR DESIRES FOR YOUR FAMILY

What is your desires regarding your family relationships:

- When you look at your children, what things would you like to see in their lives and character in the coming year? What about 10 years from now?
- When you look at your relationship with your spouse, how do you want it to be different a year from now? Three years from now? What else to look at?

**(Optional) How do you feel about your family living off your hard work?**

**Double Check:** After reviewing what you wrote down, does your answers match your values in Step 1? If applicable, do they fit into the time line you picked in Step 3?

## STEP 6 -SET UP FINANCIAL TARGETS

A) Gather your Current Financial Documents for “Current” column in the table.

B) List out “stuff” to buy and supporting costs to reach your destination.

C) Using numbers from A and B, estimate your future financials in the table.

Summary Financial	Current	Future	Difference
Gross Income (Rev-COGS)			
Total Expenses			
Tax, Loan payments, etc.			
Your Wages)			
Other			
Net Income			

## STEP 6 - SET UP FINANCIAL TARGETS

### A Simple Example:

The lakefront client did an on-line search and found a 15-acre lakefront property for sale for \$1.5 million and the client was twenty years from retiring. Doing some basic math, the business would need to earn an extra \$75,000 a year to fund his dream (\$1,500,000 divided by 20 equals \$75,000). The client put in \$75,000 at the lower-left corner and worked backwards to fill out the table below to estimate the future Gross Income amount.

This back-of-the-envelope estimate does not account for things like inflation, extra overhead expenses, personnel costs, etc. You can include them in your estimation if it's helpful, but don't get bogged down in the details. Handling the details is covered in Chapter 5 of the book.

Note from table, that Gross Income needs to increase 15% to meet the client's vision.

Summary Financial	Current	Future	Difference
Gross Income (Rev-COGS)	\$ 900,000 <i>End Here =&gt;</i>	<b>\$ 995,000</b>	\$ 95,000
Total Expenses	\$ 690,000	\$ 710,000	\$ 20,000
Tax, Loan payments, etc.	\$ 60,000	\$ 60,000	\$ 0
Your Wages)	\$ 90,000	\$ 90,000	\$ 0
Other	\$ 0	\$ 0	\$ 0
Net Income	\$ 60,000	\$ 135,000	<b>\$75,000</b> <i>Start Here</i>

### Notes:

## **STEP 7 - COMPANY VALUE CREATION**

**What products and services does your business currently provide?**

1.

2.

3.

**List some of your top customers you serve today.**

1.

2.

3.

**Summarize what value you are providing to your customers.**

## STEP 7 - COMPANY VALUE CREATION

How will your products and services benefit your future customers? Are there a few first steps to increase value created to the customer to help reach your vision?

(Yes/No) How likely is it you will reach your vision's financial goals with your current level of production and type of products and services?

Do you need to increase volume and capacity? What updates (if any) do you need to make for your products, services, or customers. If yes, what are some things that need to happen?

Are there some "good things" or 'big stuff' that you currently do (or have) today that you should leave behind. If any, what are they?

**Double Check:** Does your values match who you want to serve? If not, either the product is off or the customer profile is off. Stick with your values. Can a better match be made if you adjust?

## STEP 8 - ROLES AND POSITIONS

### Current Roles and Positions

**Write down the current roles in your company.** (no employee names!)

- |    |     |     |
|----|-----|-----|
| 1. | 6.  | 11. |
| 2. | 7.  | 12. |
| 3. | 8.  | 13. |
| 4. | 9.  | 14. |
| 5. | 10. | 15. |

**Create a simple organization chart for your current company.**

**Review the roles of your company** Do they support your new vision? Do they create enough cash-flow? Should you create new roles? Hire more people? Should you drop any roles that don't support the vision.

## STEP 8 - ROLES AND POSITIONS

### Future Roles and Positions

Write down the future roles in your company to accomplish Step 6 and Step 7.

- |    |     |     |
|----|-----|-----|
| 1. | 6.  | 11. |
| 2. | 7.  | 12. |
| 3. | 8.  | 13. |
| 4. | 9.  | 14. |
| 5. | 10. | 15. |

Create a simple organization chart for your future company.

**Review the roles of your company.** Do they support your new vision? Do they create enough cash-flow? Should you create new roles? Hire more people?

## STEP 8 - ROLES AND POSITIONS

### Culture

#### Describe your company's culture today.

How does it feel?

What do the employees think about the culture? Do they like working for you?

What does the customer's experience say about your company culture?

**Considering your answers so far, what do you see your company's culture looking like as your new vision is implemented? Is it different from today?**

**Does your company have a culture that will help you reach your GPS Destination? How?**

**Double Check:** Does your culture match your values and who you want to serve?

**EXTRA PAGE FOR NOTES AND THOUGHTS**



# YOUR GPS DESTINATION DOCUMENT

**By this date:**

**I have reached my entrepreneurial dreams of:**

**Plus I have reached my family and freedom desires of:**

**During times of opportunity or scary things, I have upheld my values of:**

*Personal Values*

*Business Values*

# YOUR GPS DESTINATION DOCUMENT

## My company now has this financial performance:

Summary Financials	Future
Revenues	
Gross Income (rev-COGS)	
Total Expenses	
Tax, Loan payments, etc.	
Your Wages	
Other	
Net Income	

The company serves these customers:

With products and services of:

The culture that fuels my company is:

My company's major roles look like:

