

# GOALS & STRATEGIES FLYWHEEL™

**“All organizations start with WHY, but only the great ones keep their WHY clear year after year.”** – Simon Sinek, Start with Why: How Great Leaders Inspire Everyone to Take Action

Why are you building this company? Why are you scaling this organization? What is your ‘why’? Before you can answer HOW, you need answer WHY. This exercise will help you articulate your why: your vision, your goals, and your measurable targets. Your answers will help guide you in building a framework for financial management and growth.

## Goals & Strategies Flywheel™ drives the vision:

Your organizational **Vision** must be:

**Realistic** - its actualization needs to be of value to the organization

**Credible** - your team should be able to believe in the vision and objectives. If the vision is not credible and does not inspire and provide a sense of purpose to the team, it will fail.

**Attractive** - The vision creates a future that people want to be part of and are motivated to work towards



## Sample Company

**Acme**

**\$6MM “Green” business and cleaning supplies**

**Vision:** Create the largest employee-owned cleaning business in the state

- **Need** (market needs it): Provide quality “green” business and cleaning supplies at competitive prices
- **Opportunity** (it can be done, team believes in it): Currently only “green” distributor in their region with owned distribution channels
- **Value** (engaging, purpose, return): Volume access to quality products allows the company to provide great service to their clients while protecting the environment and building value for the employee-owners.

## **5 Year Goals:**

1. Triple base year revenue
2. Expand distribution from regional to state-wide
3. Source, complete and integrate two acquisitions

## **3 Year Goals:**

1. Double base year revenue
2. Expand into three additional regions
3. Increase sales force by 50%

## **1 Year Goal:**

1. 20% growth on base year revenue
2. Introduce two complimentary services/products to current clients
3. Create new marketing channels that will contribute 25% to revenue

## **5 Year Measurable Targets:**

1. \$18,000,000 Revenue Goal
2. \$3,000,000 in Sales from Indiana, Illinois and Michigan
3. \$3,000,000 growth by acquisition of complimentary services.

## **3 Year Measurable Targets:**

1. \$12,000,000 Revenue Goal
2. \$1,000,000 in Sales from Cincinnati, Cleveland and Akron
3. 2 Sales Managers, total of 20 Salespeople

## 1 Year Measurable Targets:

1. \$1,200,000 in new customer Sales
2. \$100,000 in Maintenance Service Income and \$250,000 in Carpet cleaning Service
3. \$1,500,000 million in Revenue generated from affiliate and online sales.

## Now you'll create your Goals & Strategies Flywheel™

Answer the following questions. You can type directly into this as a pdf document if you'd like.

When you're done, click the Schedule button and schedule your free personal Goals & Strategies review with one of our CFO's. Together we'll chart your course for business success.

## What is your Vision for your company?

**Need** (market needs it):

**Opportunity** (it can be done, team believes in it):

**Value** (engaging, purpose, return):

## What are 3 Goals you plan on achieving over the following time horizons?

### 5 Year Goals:

- 1.
- 2.

3.

### **3 Year Goals:**

- 1.
- 2.
- 3.

### **1 Year Goal:**

- 1.
- 2.
- 3.

**What are 3 Measurable Targets you plan to achieve in support of your Goals?**

### **5 Year Measurable Targets:**

- 1.
- 2.
- 3.

### **3 Year Measurable Targets:**

- 1.
- 2.
- 3.

### **1 Year Measurable Targets:**

- 1.
- 2.
- 3.

SCHEDULE YOUR  
REVIEW

**Congratulations - you've completed the first three sections of your Goals & Strategies Flywheel™!** Now it's time to put an expert's attention on it. [Click Here](#) and schedule a Strategic CFO from ProCFO Partners to conduct a personalized review of your path forward.