

PRODUCT

Ideal Client Annual Spend:

Market Position

Product Menu	Description	Price	Capacity	Total Revenue
Lead Product				
Prospect Product				
Core Product				
Retainer Product				

PEOPLE

Operations	Delivery	Support
Sales & Marketing	Partnerships	Home life

PROCESS

Operations	Delivery
Team	Sales & Marketing

PURPOSE

Purpose of your business

Your Big Vision

Money Goals	Short-Term	Long-Term
Need		
Want		

12 month money goal

PACE

Time	
Energy	
Wellbeing	
Cycles	