

My Current Business

3-Year Vision || Worksheet

Use this worksheet to capture what your current business looks like in each of these areas.

Products:

List all of your current products or product groups that you sell.

Customers:

List all of your current customers or customer groups that you sell to.

Operations:

List the things that you do to make your business run. Include space, systems, processes, etc.

Marketing:

List everything you are currently doing to raise visibility and market your business.

Yearly Sales:

Locations:

Number of Employees:

Employee Benefits:

Governance:

Personal Income:

