

Module 1: Define Your Business Blueprint

Summary

Focus on creating clarity through data-based goals, team alignment, and adaptable planning systems.

Sections & Action Items

Set Clear, Data-Based Goals

- Review last year's performance metrics
- Identify top-performing services and gaps
- Set 1-year and 3-year goals based on data

Align the Team Around a Shared Direction

- Map your current sales and operations process
- Define clear handoff points
- Make goals visible to your team

Adapt Growth Plans to Reality

- Review seasonal trends and workload patterns
- Adjust staffing and scheduling plans
- Identify early warning signals in pipeline data

Reflection Question

If your workload doubled next year, what part of your business would break first?

Next Steps

1. Document your 1- and 3-year goals
2. Standardize one key process
3. Schedule quarterly performance reviews

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Module 1: Business Clarity Audit

How to Use (2–5 min)

Answer quickly. Be honest. Circle your scores. Focus on ONE fix this month.

1. Direction & Goals

Clear 1-year goal Clear 3-year direction

Top performing area: _____

Biggest constraint: _____

Clarity Score (1–5): _____

Score Guide: 1 = no clear direction | 3 = some goals | 5 = fully defined & tracked

2. Process Alignment

Sales process defined Team follows same steps

Where do handoffs break? _____

Alignment Score (1–5): _____

Score Guide: 1 = inconsistent | 3 = partially followed | 5 = standardized

3. Business Stress Test

If work doubled, what breaks first? _____

Root cause: _____

System to fix first: _____

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4. 30-Day Focus

1 priority fix: _____

Owner: _____ Deadline: _____

Contractor Tips

- Don't overthink scoring—this is directional, not perfect
- Focus on the weakest score first
- Revisit this every 90 days

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