

Five-Year Goals

Revenue & Profit Target

Year-by-year growth (comparison to historical growth rate)

Breakdown of revenue at target

- By locations
- By market segments
- By key customers

Key business strategies

- Anticipated market trends and changes
- Evaluation of new markets
- New product development
- Key elements of sales and marketing plan
- Competitive impact and opportunities

Structural changes

Employees

- Increase in employees
- Additional managers and executives
- Organizational chart of the future
- Key people strategies – hiring, retaining, development

Physical

- Additional or larger location
- Key factors

Equipment/Technology

- Major additional equipment needs
- Hardware/software opportunities to impact productivity
- Internet strategy

Leadership

- Key changes in CEO role
- Other key leadership needs
- Succession planning

Discussion points/questions

- Are goals aggressive enough? Over the top?
- What are the 3-4 critical hurdles to reaching the five year goal?
- What's the biggest shift in thinking or behavior that needs to be made?