

THE PLANNING HIERARCHY



WEALTH CREATION PLAN

What the business needs to deliver to you personally.

5 - 10 years

STRATEGIC PLAN

Core purpose, values and vision. What business you're in. Your brand promise.

5 - 10 years

ANNUAL PLAN

12 month goals, high level budget, SWOT.

12 months

90 DAY PLAN

90 day goals; who's responsible and by when.

3 months

ONGOING TASKS

5 KPIs (business and individual team members).

Daily and weekly