



How Will You Get There?



THE BUSINESS GOAL ROADMAP™

A simple business assessment
to explore the smartest paths
from where your business is today
to where you want it to go.

*Start with the destination.
Then work backward.*





Where do you want your business to be 12 months from now?



CHOOSE THE CLOSEST ANSWER:

- ☐ Increase revenue to a specific target
- ☐ Work fewer hours or remove myself from delivery
- ☐ Launch a new product, service, or business
- ☐ Create recurring revenue
- ☐ Increase profit
- ☐ Get more customers
- ☐ Grow without adding a lot more overhead
- ☐ Build a business that can operate without me
- ☐ Expand into a new market or audience
- ☐ Something else: _____

WHAT WOULD ACHIEVING THIS CHANGE FOR YOU PERSONALLY?

The business goal matters. So does the reason behind it. More revenue might mean greater freedom, more security, time with your family, the ability to build a team, or finally creating the business you originally imagined.

 WHERE ARE YOU TODAY? _____

Where is your business today?

Before you can build the path forward,
you need a clear starting point.

_____  _____

CURRENT ANNUAL REVENUE: _____

PRIMARY PRODUCT OR SERVICE: _____

APPROXIMATE NUMBER OF CUSTOMERS OR CLIENTS: _____

HOW DO MOST CUSTOMERS CURRENTLY FIND YOU?

WHAT ARE YOU CURRENTLY DOING TO GROW THE BUSINESS?

WHAT HAS WORKED BEST SO FAR?

WHAT HAVE YOU TRIED THAT HAS NOT
PRODUCED THE RESULT YOU EXPECTED?



What do you believe needs to happen for you to reach your goal?

Most of us already have an idea about what our business needs next.



YOU MAY BELIEVE YOU NEED:

- | | |
|---|--|
| ☐ More marketing | ☐ Different pricing |
| ☐ More leads or customers | ☐ More people on your team |
| ☐ Better sales or conversion | ☐ Better systems or processes |
| ☐ A new product or service | ☐ AI or automation |
| ☐ A new website | ☐ Something else: _____ |

WHAT DO YOU BELIEVE IS THE MOST IMPORTANT THING YOUR BUSINESS NEEDS RIGHT NOW TO REACH THE GOAL YOU IDENTIFIED ON PAGE 2?

MY CURRENT HYPOTHESIS:

HOW CONFIDENT ARE YOU THAT THIS IS THE RIGHT PATH?



Hold onto this answer.

What you believe your business needs may be exactly right.

But before you invest more time or money into it,

let's look at your goal from a few different angles.

There may be another path you haven't considered yet.





There may be more than one way to reach your goal.

The answer you wrote on the previous page may be part of your path.
But before deciding what to do next, look at your business from a few different angles.



COULD YOU REACH YOUR GOAL BY...

- | | |
|--|---|
| ☐ Selling more of what you already have?
Is there untapped demand for an offer that is already working? | ☐ Reaching a different customer or market?
Could your existing expertise, product, or service create value for another audience? |
| ☐ Increasing what each customer is worth?
Could pricing, packaging, additional services, or complementary offers increase customer value? | ☐ Building partnerships or referral channels?
Who already has access to the customers you want to reach? |
| ☐ Getting existing customers to buy again?
Could retention, repeat purchases, renewals, or recurring revenue create growth? | ☐ Improving the customer experience?
Could reducing friction, increasing trust, or improving delivery help customers stay longer, buy more, or refer others? |
| ☐ Making it easier for interested people to buy?
Could improving your sales process, follow-up, offer, or customer journey increase conversion? | ☐ Freeing up capacity for growth?
What could be standardized, delegated, simplified, or removed so the business can handle more? |
| ☐ Creating something new to sell?
Is there an unmet customer need that could become a new product, service, or revenue stream? | ☐ Using AI, automation, or better systems?
Could the business accomplish more without adding an equivalent amount of time, people, or cost? |

WHICH THREE PATHS FEEL MOST WORTH EXPLORING?

1. _____
2. _____
3. _____

You don't need to pursue every opportunity. The goal is to recognize that the path you first assumed you needed may not be the only one available.





Which path deserves a closer look?

Not every opportunity deserves the same attention.

You identified three possible paths on the previous page.

Now let's look at each one against your actual business goal.



For each path, rate the following from 1–5, with 5 being the strongest.

PATH 1: _____

Potential impact <i>How much could this move you toward your goal?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Speed to test <i>How quickly could you find out whether this opportunity has potential?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Ability to execute <i>Do you currently have the time, people, resources, or capabilities needed to pursue it?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

PATH 2: _____

Potential impact <i>How much could this move you toward your goal?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Speed to test <i>How quickly could you find out whether this opportunity has potential?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Ability to execute <i>Do you currently have the time, people, resources, or capabilities needed to pursue it?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

PATH 3: _____

Potential impact <i>How much could this move you toward your goal?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Speed to test <i>How quickly could you find out whether this opportunity has potential?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
Ability to execute <i>Do you currently have the time, people, resources, or capabilities needed to pursue it?</i>	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

Now step back and look at your answers.

Which opportunity appears most capable of moving you toward your goal without requiring more than your business can realistically support right now?

The path I want to investigate first:

Don't worry about choosing perfectly. You're not committing to a strategy yet. You're identifying the opportunity that deserves a closer look.





A promising path still needs to be tested.

You identified one opportunity that may help move your business toward its goal. Before you invest significant time or money into it, take a closer look.



THE PATH I'M EXPLORING: _____

1. What evidence do you already have that this opportunity exists?

Think about what your customers, sales, data, team, or past experience are already telling you.

2. What would have to be true for this path to actually move you toward your goal?

3. What could make this the wrong move right now?

Consider cost, capacity, timing, demand, resources, profitability, or anything else that could change the answer.

4. What do you still need to know before making a decision?



A good idea and the right strategy
are not always the same thing.

The right path has to make sense for your goal,
your customers, your economics, your capabilities,
and where your business is today.



What can you do this week to learn whether this path is worth pursuing?

You don't need to build the entire strategy yet.
Start with one action that gives you better information.

DEPENDING ON THE PATH YOU'RE EXPLORING, THAT COULD MEAN:

- Reviewing which products, services, or customers generate the most profit
- Looking at where potential customers are dropping out of your sales process
- Talking to current or past customers about what else they need
- Reviewing your pricing and packaging
- Looking at how often customers return or buy again
- Identifying businesses or organizations that already serve your ideal customers
- Mapping the work that currently depends on you
- Reviewing where time or money is being lost in delivery
- Testing demand for a new offer before fully building it
- Identifying one process that could be simplified, automated, or improved with AI

THE ACTION I WILL TAKE THIS WEEK:

WHAT AM I TRYING TO LEARN?

WHAT WOULD I NEED TO SEE TO FEEL MORE CONFIDENT THAT THIS IS THE RIGHT PATH?



The goal isn't to do more.
It's to learn what deserves to happen next.

One small test can give you better information
before you commit significant time, money, or resources to a direction.





You started with a goal. Now you have a path worth exploring.

Take a moment to bring everything you've uncovered into one place.



WHERE I WANT TO GO

My 12-month business goal:



WHY IT MATTERS TO ME

What achieving this goal would change:



WHERE I AM TODAY

The biggest difference between my business today and the business I'm trying to build:



WHAT I ORIGINALLY THOUGHT I NEEDED

My original hypothesis:



THE PATH I WANT TO EXPLORE



WHY THIS PATH MAY MATTER



MY NEXT STEP

The action I will take first:



WHAT I NEED TO LEARN



This is your starting roadmap, not your final strategy.

*You've moved from "What should I be doing?" to a much more useful question:
"Is this the right path to get me where I want to go?"*

Your next step is to validate that path against the realities of your business and determine what needs to happen, and in what order, to reach your goal.





You know where you want to go. Now let's build the plan to get you there.

The Business Goal Roadmap™ gave you a different way to look at your goal.

You started with where you want your business to go, looked at where you are today, challenged your original assumptions, and explored other paths that may be worth pursuing.

But identifying a possible path and knowing exactly how to execute it are two different things.

That's where Scale Clarity™ comes in.

In a Scale Clarity™ Session, I go deeper into your business to determine what actually needs to happen to move you toward your goal.

We look at your business as a whole, including your customers, offers, revenue, profitability, operations, capacity, customer experience, sales and marketing, and the resources you have available.

FROM THERE, I:

01

Validate the opportunity

Determine which opportunities make the most sense based on your actual business.

02

Identify what stands in the way

Find the constraints, gaps, or decisions that need to be addressed before you can move forward.

03

Determine the path

Establish the priorities most likely to move you from where you are today toward where you want to go.

04

Build your plan

Turn those priorities into a focused strategy so you know what to do, what comes first, and what can wait.

05

Help you get started

Create practical Activation Starters™ so you can begin putting the plan into action.



Tell me where you want to take your business. I'll build the plan to get you there.



* Apply for Scale Clarity™ *



A Call To THRIVE