

Keep-it-simple-summary

(Template)



(name) is a (type of business) catering to/focused on supporting (primary customer segment) in (location). It solves (customer problem/gap being addressed) through (unique selling proposition/value proposition). It is led by (your name), a (max 3 descriptors) + (your position) who cares deeply about/wants to (why you do this). In the next 12 months it will prioritize (1-2 activities/initiatives) in support of its medium term strategic goal of (state goal).

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(Example)

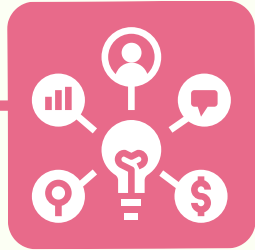


Mothership Coaching is an executive coaching and consultancy firm focused on supporting founder-leaders who wish to level up themselves and the organizations they lead. It supports leaders in identifying, translating and executing their personal and organizational goals through executive coaching and strategic business consultancy. It is led by Tere, a creative and well-rounded Coach who cares deeply about giving leaders a safe space to work through their ideas, and a structure to develop and execute strategy towards success. In the next 12 months, Mothership Coaching will refine its programs for leader-led organizations and on board 3 new CEOs as executive coaching clients. This supports Tere's medium term goal of obtaining her PCC accreditation by early 2025.



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(Your turn!)



A large, empty rectangular box with a red border, intended for writing a summary.

Numbers in Brief



2023 Total Revenue

Top 3 Drivers/Sources

1. _____
2. _____
3. _____

**% Growth or Reduction
from Prior Year?**

2024 Target:



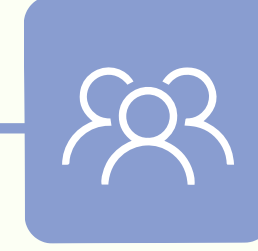
2023 Total Cost

Top 3 Drivers/Sources

1. _____
2. _____
3. _____

**% Growth or Reduction
from Prior Year?**

2024 Target:



Customers

Total Number:

New in 2023:

Target in 2024:

Employees

Total Number:

New in 2023:

Target in 2024:

Reflection



What went well in 2023?



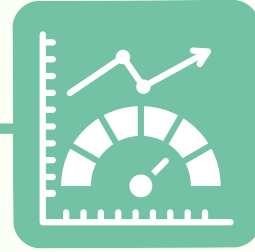
What did you learn in 2023?



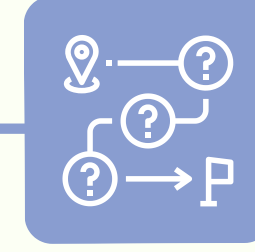
What did you invest in 2023?



What are you excited about in 2024?



What will move the needle in 2024?



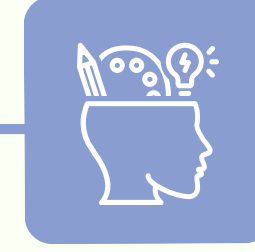
What could get in the way in 2024?



What 3 things do you want to get out of this retreat?



Who are the 3 people you need to connect with in 2024?



What 3 skills will you need to sharpen this 2024?