



The CEO State of the Business Outline™

PAST - PRESENT - FUTURE



Name:

Date:

PAST - Previous Highlights

What would you define as the highlights of your business over the past quarter. Toot your own horn! Outline 3-5 areas of progress, success, or achievements that you view as highlights for your business over the past quarter, why it’s important to you or your team, and what’s next to continue the momentum.

Highlights	Why It’s Important to You	Why It’s Important to Your Team	What’s Next
1.			
2.			
3.			
4.			
5.			

PRESENT - Crucial Conversations: Issues

Which areas of your business do you most seek advice or counsel from other professionals you trust?
Please state the issues, why it’s important to you, and what insight you seek from others.

Issues	Why It’s Important to You	What Insight You Seek From Others
1.		
2.		
3.		

PRESENT - Crucial Conversations: Opportunities

What are the largest opportunities available to you and your team/firm in the next quarter?

Opportunities	Why It's Important to You	What Insight You Seek From Others
1.		
2.		
3.		

FUTURE - Outstanding Questions

What questions do you need to answer for yourself or your team/firm in the next quarter?

Questions	Why It's Important to You	What Insight You Seek From Others
1.		
2.		
3.		

FUTURE - My Focus/My Priorities

Describe what you and your team expect to achieve in the next 90-Days.

NOTES:

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