

Vision Organizer

Last Update: December 2021
Next Update: April 2022

CORE VALUES

1. Creative

- Purposeful
- Brave
- Problem-solver

2. Resourceful

- Problem-solver
- Adaptive
- Supportive

3. Reliable

- Consistent
- Thorough
- Efficient
- Accountable

4. Visionary

- Open-minded
- Future-thinking
- Pragmatic

5. Good Communicator

- Honest
- Clear
- Solution-focused

CORE FOCUS

Purpose: Supporting Entrepreneurs with a Health and Wellness Company

Niche: Supporting growth focused goals

10-YEAR TARGET:

- Helping 1000's of businesses achieve the scale for the business they have always dreamed of.

MARKETING STRATEGY:

Target Market

Privately-held, medium-sized businesses in Health and Wellness

Niche: Health and Wellness

Company Profile:

Size - 20+ people or 5 million in annual revenue

Their target market - B2C

Geographic Focus - North America

Budget - \$0/month

Prospect Profile:

Job Title - Owner

Pain Points - They need a strategy to be more responsive, proactive, and responsible for helping them hit their revenue goals.

Personality Traits - An engaged professional looking to change the world.

Key Needs/Wants - They need better results from sales and marketing.. They need guidance on how to create the right customer journey.

Marketing Experience - Experienced in general, but not savvy about the latest trends and tactics.

Three Uniques

1. Ownership Mindset
2. Data-Driven
3. Community Builder

Proven Process

1.

Empathize

Research:

- Discovery
- Persona
- SWOT

2.

Define

90-Day Plan:

- KPI's
- Deliverables
- Timeline

3.

Ideate

Brainstorm

- Creative Direction

4.

Prototype

Production:

- Creative
- Marketing
- CRO Call

5.

Launch/Test

Execute:

- Implement Plan
- Test, Review, Reset

Guarantee:

If for any reason you are not happy with our work you can cancel the agreement, no questions asked. You will be able to leave with our IP and concepts without having to fulfill the obligation of the contract.

3-YEAR PICTURE:

- Future Date: January 1, 2025
- Revenue:
- Measurables:
- What Does it Look Like?

1-YEAR PLAN:

- Future Date: January 1, 2023
- Revenue:
- Measurables:
- Goals for the Year:

ROCKS:

- Future Date: March 31, 2022
- Measurable:

Rocks for the Quarter:

1.	
2.	
3.	
4.	
5.	
6.	
7.	

ISSUES:

1.	Bandwidth
2.	Identifying Right Contacts (Media List)
3.	Recruitment
4.	Bias
5.	COVID