




Vision & Planning Worksheet

Answer these questions to inform your business strategy and start setting priorities. If you're looking for more hands-on guidance, [visit our website](#) to learn more about the services we provide to help build lasting, profitable businesses, including: one-on-one coaching, bookkeeping, project management, digital marketing, and more.



Core Business

- What is your 'elevator pitch' for your business?
- Why do you want to run your farm?
- What does the farm look like in 5 years?
- What impact do you want to have in the world and your community, and how can your farm and products help create or amplify these impacts?
- What is the problem you want to solve for your customers?
- What will your products be in the next 3 years?
- What DON'T you want to do?
- Who will be buying your products? Describe your typical customer, or brainstorm words/characteristics that describe a target customer.
- How much personal income do you need to receive from the farm in the next year, 3 years, and 5 years.
- What are some archetypes for your farm model? Inspiration?
- What are the main values that drive your day-to-day work?

Team

- Who is on your core team? What experience does your current team have?
- What is working well on the farm right now? What are some specific past successes you have experienced?
- What is not working on the farm right now? What are some specific past failures you have experienced?



Vision for Market

- Who will be selling and tending to customer service?
- What is our unique value proposition for our customers?
- What kind of marketing and branding work do you need, based on your sales channels?

Vision for Operating and Financing

- What kind of infrastructure do you currently have? Land, buildings & equipment, other assets, etc..
- What infrastructure and capital expense costs do you foresee in the next year, 3 years, and 5 years?
- What capital do you have available currently? I.e., Lines of credit, internal funds/cash.
- What capital might you be able to access? Friends/family, private investors, banks, FSA, grants, loans, etc.
- What are the certifications and permits you need to sell your products? (Food safety, quality certifications, regulatory compliance, etc.)

Big Picture

- What are the top 3 things that you need to learn and how will you learn them?
 - How much money do you need?
 - What is your main goal? Grow to \$X in what amount of time?
 - What's the ramp up on this look like? In 1 year, 3 years, and 5 years.
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