

CHARACTERpreneur® Certification Training

*Your Blueprint for Building a
Purposeful, Productive & Profitable Business Culture*

5 YEAR VISION & PLANNING GUIDE

Use the following page to develop an actionable plan for the next five years of your professional life that is sufficiently defined, yet appropriately flexible. T Incorporate the SMART Goal Formula and CHARACTERpreneur® Core Values that you learned in Modules 1 and 2 of this Certification Program in your 5 Year Vision and the resulting plans of action.

SMART Goal Formula	CHARACTERpreneur® Core Values
S .pecific M .easurable A .ctionable R .elevant T .ime-Bound	C .ourage H .onor A .ccountability R .esourcefulness A .uthentic C .urrency-Wise T .imely E .xcellence R .everence

For maximum impact and effectiveness, refer to the vision, mission, and core values statements you developed in CHARACTERpreneur® Training Module 1 when completing the following pages.

5 Year Vision & Plan

Create a picture of where you will be and make it real. This is an effective way to see the big picture, focus on what and who really matters, eliminate unimportant things and events, and be a good steward of your resources (including time). Your 5 Year Vision should be supported by the mission statement you wrote in Module 1


1. Where do you want to be in 5 years?

- a. Describe your professional life with great specificity.
 - Employment and/or Business Ownership
 - Ideal Year
 - Ideal Day
 - Desired Relationships - professional and personal
- b. What CHARACTERpreneur® core values will be necessary to help you make your 5 Year Vision your reality?
- c. What CHARACTERpreneur® core values are necessary to help you remain the person you were born to be, doing the Work for which you were created?



2. Connect what you want to happen in the next 5 years to your vision, mission, and statement of values that you completed in Module 1.

- a. How will you feel about your life and your work 5 years from now?
- b. What will be the impact of your 5 Year Vision on your life, work, and family?
- c. What will be the impact of your 5 Year Vision on your community?
- d. What will be the impact of your 5 Year Vision on the world at large?



A large rectangular box for writing, with a green spiral-bound notebook icon in the top-left corner.

3. Conduct a SWOT (*Strengths, Weaknesses, Opportunities & Threats*) **ANALYSIS.** Use this analysis to make sure you know exactly where you are now and what is required to make your 5 Year Vision and SMART Goals a reality.

STRENGTHS	WEAKNESSES
THREATS	OPPORTUNITIES

a. Strengths

- What are your strengths?
- What CHARACTERpreneur® Core Values are reflected in your strengths?
- Make this step even more accurate by asking 2 to 3 people who know you in each of the following environments: personal environment, professional environment, or both environments.



b. Weaknesses

- What are the weaknesses that you have self-identified that need to be strengthened or supplemented to make your 5 year vision a reality?
- What CHARACTERpreneur® Core Values can help you strengthen, delegate or outsource your weak areas?
- Make this step even more accurate by putting your ego aside and asking 2 to 3 people who know you in each of the following environments: personal environment, professional environment, or both environments.
- What weaknesses need to be strengthened and which ones need to be responsibly delegated or outsourced?



c. Opportunities

- What need does your 5 Year Vision solve?
- Whose lives are made better when you manifest this vision?
- Where are the gaps between what is available now and what you are working to create through your 5 Year Vision?





d. Threats

- What could prevent your 5 Year Vision from becoming a reality?
- What do you need to have in place in order to prepare for these possible threats.
- What do you need to acquire (e.g., assets, information, expertise, skills, experience, relationships, etc.)?
- What activities do you need to improve to reach the goal (e.g., mindset, financial picture, discipline, sales)?





4. Break down your 5 year vision into the components that are necessary for it to become a reality.

- a. Write down each component. Examples include:
- *Obtain a specific degree or certification*
 - *Raise \$xxx in funding*
 - *Increase revenue to \$\$\$ - which represents a % increase*
 - *Purchase a building*
 - *Get a specific type of professional experience*

What specific processes, procedures and/or systems do you need to be mindful of, acquire, or develop in order to achieve each component listed. *You may need an extra sheet of paper to answer this question.*

- 1.
- 2.
- 3.
- 4.

5.

6.

7.

8.

9.

10.

11.

12.

- b. Once you have written down the components of your 5 Year Vision, go back to your SWOT analysis to determine if your 5 year vision is something that you commit to pursuing until completed within 5 years or if you need to extend or decrease the estimated time necessary to complete it.**

When reviewing your SWOT analysis with the components in mind, know that the following things are true and do not be discouraged or alarmed.

- It is possible that once you complete this step of the process, your 5 year goal could become a 7 or 10 year goal.
- It is also possible that you realize your 5 year goal can be completed in 3 years and you need a bigger vision for what you can complete in 5 years.

Write down the results of your review.



5. Write down the individuals or types of individuals you need to connect with in order to make your 5 Year Vision a reality.

a. Be specific about individuals, and/or titles, and/or specific positions.

- Create a plan to build and nurture relationships.

6. **Write down the organizations, associations, governments or other corporate structures with which you need to have a relationship in order to ease the path to making your 5 year goal a reality.**

- a. **Develop a plan to build and nurture relationships.**

7. **Make a list of the habits you need to develop in order to make your 5 year vision goal your reality.** *Consider the following two recommendations and write your thoughts in the space below.*

- a. **Invest in independent research to determine the necessary daily habits.**
- b. **Hire a coach or consultant to determine the necessary daily habits.**

3 Year Objective

Ask yourself: What specific results do I want to experience in my personal life and my business three years from now that will be a significant milestone in my 5 year vision? Answer the questions below to help guide your process.

1. Describe your professional work status.

- a. Business owner?
- b. Specific type of position in a company?
- c. Specific industry?



2. Describe your financial picture.

- a. Income.
 - What percentage or number increase is this above current income?
- b. Revenue
 - What percentage or number increase is this above current revenue?
- c. Number of total clients
 - What number or percentage increase is this above current clients?

3. Describe the significant relationships in your life.

- a. Envision them specifically and write what you see.

4. What one goal must be accomplished in each of the following three years to make this happen?

You can include up to three goals for each year, but no more than 3.

- Year One:
- Year Two:
- Year Three:



5. Move forward to 12-Month S.M.A.R.T. Goals.

Once you have answered these questions, you are ready for your SMART Goals.

12-Month S.M.A.R.T. Goal

Specific. Specifically, what will you accomplish?

Think in terms of what you can start and finish within one year. Your answer should take into consider your available time, relationships and financial resources. Keep in mind that with God all things are possible; however, in order to be a good steward of your time you must plan with your current situation in mind. Write down what you can do and allow God to expand as it is His will.




Measurable. How will you know when you have accomplished this goal? Think in terms of numbers and tangible results.



Actionable. Write up to 12 things that must be completed within a year to make the 12-month SMART goal a reality. Each one of the things that you list here will become a monthly (30-day) objective.

1.
2.
3.
4.
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10.
11.
12.

Relevant. How does this SMART Goal and these actions support your 5 Year Vision and 3 Year Results. Make sure each step is necessary. Your objective: No wasted time or misused energy.



Time-bound. Make sure each thing you have listed in the Actionable category can be accomplished in 30 days (*a month*), 90 days (*a quarter*), or 12 months (*a year*).

Based on your assessment, determine whether your 12-month SMART Goal should become an 18-month, 2-year, or 3-year goal. *It is totally possible and not unusual that once you do the work required to make your goal SMART your reality, you realize that you need more time. Make any necessary adjustments so you can work confidently in the direction of your goals.*



DAILY HABITS:

What must you do every single day to make your SMART goal a reality?

- 1.
- 2.
- 3.

OPTIONAL: Quarterly and/or Monthly SMART Goals

Consider breaking your 12-month goals into monthly or quarterly S.M.A.R.T. Goals or objectives. Use the SMART Goal Chart to help. *A link to this chart is on the following page.*

Essentials to Accomplish Your Goals on Time

1. Self-Discipline.

- In what areas do you need to be more disciplined?
- What will being more disciplined help you do better?
- What will you do to increase your discipline?
 - Be SMART. :)

2. Daily Habits

- What daily habits do you need to incorporate into your routine to be more effective?
 - Be SMART. :)

3. Scheduled time to work on your goals.

- Exactly when will you work on your vision, objectives & goals.
 - Think of specific times on specific days.
 - Write it down.
 - Commit to it.

4. Identify obstacles

- Develop a plan to overcome all obstacles that you list so you are prepared when you encounter them.

SMART Goal Worksheet

Download: <https://www.characterpreneur.com/5-Year-Planner>



About Us



CHARACTERpreneur™ is non-denominational, faith-based leadership and business development program. We teach leaders exactly how to build influential, character-driven, profitable enterprises that add value while building wealth. Our certified leaders learn exactly how to develop purposeful, productive and profitable business cultures that attract and multiply ideal clients & customers, team members, stakeholders, and business opportunities.

CHARACTERpreneur® Certification incorporates non-denominational, faith-based core concepts, effective business and legal experience, productivity strategies, and positive character-traits into an innovative, proprietary methodology that develops character-driven stewards of profitable businesses. The Certified CHARACTERpreneur® is equipped to build and lead enterprises that build sustainable wealth while creating value for the people they serve.



The Faith Focus Flow® Institute for Character and Leadership (FaithFocusFlow®) is the leadership division of Upward Action LLC. The FaithFocusFlow® division is dedicated to developing resources and learning opportunities that help leaders building character-driven businesses that transform the world one person at a time.

The innovative CHARACTERpreneur™ methodology was developed by TC Cooper, founder of FaithFocusFlow®.



About TC Cooper

Tasha L.C. (TC) Cooper is the founder of UpwardAction®, an on-demand training and social media consulting company. She is also founder of the FaithFocusFlow™ Leaders Institute, home of the CHARACTERpreneur™ certification program for business leaders who build businesses with integrity.

Armed with nearly two decades of legal and business experiences including private practice, government service and entrepreneurship, TC's unique background fuels her ability to help clients leverage the power of social media and internet marketing to build profitable brands that have a positive, legacy-building impact on their industries. More than 60,000 people follow her accounts on social networks for actionable, effective social marketing advice.

TC has been seen in publications that includes Forbes.com, Black Enterprise, Washington Lawyer Magazine and others. She has also been an instructor for the Black Enterprise Small Business University, New Jersey Small Business Development Centers and DC Bar Association.

TC earned her law degree from Columbia Law School and undergraduate degree from Hampton University. She is a trained and certified corporate coach.