

1909 Sync Session Worksheet (Please complete as Pre-Work)

Date: _____

Section 1: Company Foundations

Company Name:

Mission:

(Why does your business exist, what are you doing for your customers?)

Vision:

(What is the long-term goal you are working towards?)

Values:

(List your business's core values that guide decisions and actions.)

Purpose for Running the Business:

(Why are you personally committed to this business?)

Customer Problem You Are Solving (or Need You Are Meeting):

(What key problem are you addressing for your customers?)

Date Last Reviewed Business Model Canvas:

Section 2: Reflection on the Past Month/Quarter

1. What is working?

(List the strategies, actions, or areas of your business or personal life that are moving in the right direction.)

2. What isn't working?

(Identify the areas where you are facing challenges, roadblocks, or inefficiencies.)

3. Now what?

(What steps or changes will you take to improve on what isn't working and enhance what is? Be specific. Think about the next 30 and 90 days)

Section 3: Active Quarterly Goals

1. What are your top 3 goals for this quarter, how do these connect with your goals for the year?

(These goals should align with your long-term vision and business growth strategy.)

Section 4: Monthly Goals Aligned to Quarterly Objectives

1. What actions will you take this month to move towards your quarterly goals?

(For each quarterly goal, break down specific actions to focus on in the current month.)

- **Monthly Goal 1:**
Actions for this month:

- **Monthly Goal 2:**
Actions for this month:

- **Monthly Goal 3:**
Actions for this month:

Section 5: 1909 SCORE

Rate the following areas on a scale of 1-10, where 1 is poor and 10 is excellent:

1. Growth:

(How do you rate the overall growth of your business this past month?)

Score: _____ / 10

2. Revenue:

(How do you rate your business's financial performance and revenue generation this past month?)

Score: _____ / 10

3. Morale:

(How do you rate your personal morale and that of your team or business culture?)

Score: _____ / 10

4. Wellbeing:

(How do you rate your personal wellbeing and your ability to maintain a healthy work-life balance?)

Score: _____ / 10



Section 6: Resource Use Evaluation

1. How did you use your resources this past month?

Rate your use of **time, energy, attention, and money** on a scale from 1-10.

- **Time:** _____ / 10
- **Energy:** _____ / 10
- **Attention:** _____ / 10
- **Money:** _____ / 10

Section 7: Aligning Resources for Success

1. How can you improve your use of resources and allocate to meet your goals this month?

(Write a short strategy for each resource.)

- **Time:**

- **Energy:**

- **Attention:**

- **Money:**

Section 8: Accountability & Support

1. Who will help hold you accountable this month?

(Identify a person or group who will support your progress.)

2. What resources, tools, or support do you need to achieve your goals?

3. Do your current goals align with your company's mission, vision, values, purpose and problem?

4. How do you plan to balance personal well-being and professional success this month?

(Identify steps for success between your personal and business life.)

5. What is your key takeaway or commitment for the month?

6. What are you avoiding?