

## *Family/Business Direction Exercise*

### Thriving in Challenging Times

#### **Step 1: Assessment**

<b><u>Goals</u></b>	<b><u>Financial Status</u></b>
<b><u>Challenges</u></b>	<b><u>Opportunity</u></b>

## **Step 1: Assessment Questions**

### **Goals**

What are the desired realistic outcomes you want to achieve now and as we come out of this crisis?

### **Financial Status**

What is presently happening financially – good and bad?

### **Challenges**

What key factors are limiting you in reaching your goals?

### **Opportunities**

What ways can you make the crisis work for you?

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## Step 2: Action

<b><u>Stay Informed</u></b>	<b><u>Ensure Financial Security</u></b>
<b><u>Systematically Build Demand</u></b>	<b><u>Acquire Resources</u></b>

## **Thriving in Challenging Times**

### **Step 3: Adjustments**

**What will you do to adjust to the environment as it continues to change and remain challenging?**

- I will continually reassess what is going on personally and in my business.
- I will constantly make modifications and refinements in order to produce the best possible outcomes.