

BUSINESS PLAN

WHERE YOUR JOURNEY BEGINS



UPLEVELING YOUR BUSINESS

Pillar 1: Planning

Describe the business you want to build in plain English:

What is your Mission?

What are the Core Values of your business?

What is the Culture you want to build in your business?

What are your top 5 Short-Term Needs (hint cashflow is usually on this list)?

Based on the above, what are the first 3 things you need to do?

What are your Long-Term Goals for this business?

Pillar 2: Marketing and Sales

For Marketing and Sales, I currently grade my business:

A+ A A- B+ B B- C C- D+ D D- F

Sales:

How much do you need to sell?

Marketing:

Describe your Ideal Clients.

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How will you get those clients in the door?

Marketing you are doing currently.

Marketing you want to do.

Your Marketing Plan: What are 3 marketing campaigns you commit to launch in the next 2 quarters?

Name 3 ways you can build marketing systems to help automate your marketing:

Pillar 3: Management

For Management, I currently grade my business:

A+ A A- B+ B B- C C- D+ D D- F

Staffing:

Who do you need to hire in the next 4 quarters?

Who do you need to hire first?

What do you need to do to prepare to onboard the new employee properly?

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Workflow:

Describe how you currently do what you do:

What improvements would you like to see in the next year?

What needs to happen to make those improvements happen?

Systems:

I currently have the following Systems running smoothly in my business (Sales systems, marketing systems, work flow systems, hiring/ firing systems, etc):

I intend to do the following to improve my systems over the next 4 quarters:

Supporting Your Team with the Right Tools:

What tools will your team need to do a good job?

Do you need more space for your people or your inventory?

What furniture or equipment do you need to purchase or replace in the next 4 quarters?

How might you outsource some duties over the next 4 quarters?

Pillar 4: Financial Controls.

For Financial Controls, I currently grade my business:

A+ A A- B+ B B- C C- D+ D D- F

My financial controls team is made up of the following individuals to help me be a good money manager. (CPA, bookkeeper, billing clerk, etc)

Lag Metrics:

My business reviews: currently within 3 months within 6 months
Monthly Balance Sheet
Monthly Profit & Loss (P&L)
Monthly Budget
Budget Variance Report
Accounts Payable Report
Accounts Receivable Report
Daily Posted Cash Report

Lead Metrics:

Sales Report
Pre-Sales Report
Marketing Report: online
Marketing Report: networking
Marketing Report: calls
Marketing Report: referrals
Marketing Report: other