

## Welcome to The Grow My Profit Business Optimizer!

Here's how to use this performance improvement tool to increase your productivity and personal income faster than you ever thought possible:

1. Click "FILE" at the top, select "MAKE A COPY", name the file and save it so you can edit your own copy online OR select "Download" and then "Microsoft Excel" file to save it to your hard drive
2. Complete the Business Assessment by clicking on the "Business Assessment" tab at the bottom of the page
3. After completing the Assessment, review the "Business Assessment Results" tab and see where you need additional coaching and support to help you improve your business and achieve your personal goals and dreams.
4. Each of the following tabs address the Six Steps to Scale 2-10x in 3-5 years. Use these sections to help you leverage the coaching resources available. Return back to this Business Optimizer on a regular basis to continue your improvement in each of the six categories and re-take the Business Assessment to see your professional growth and development.
5. For additional coaching support please visit [www.GrowMyProfit.com](http://www.GrowMyProfit.com) to learn more.

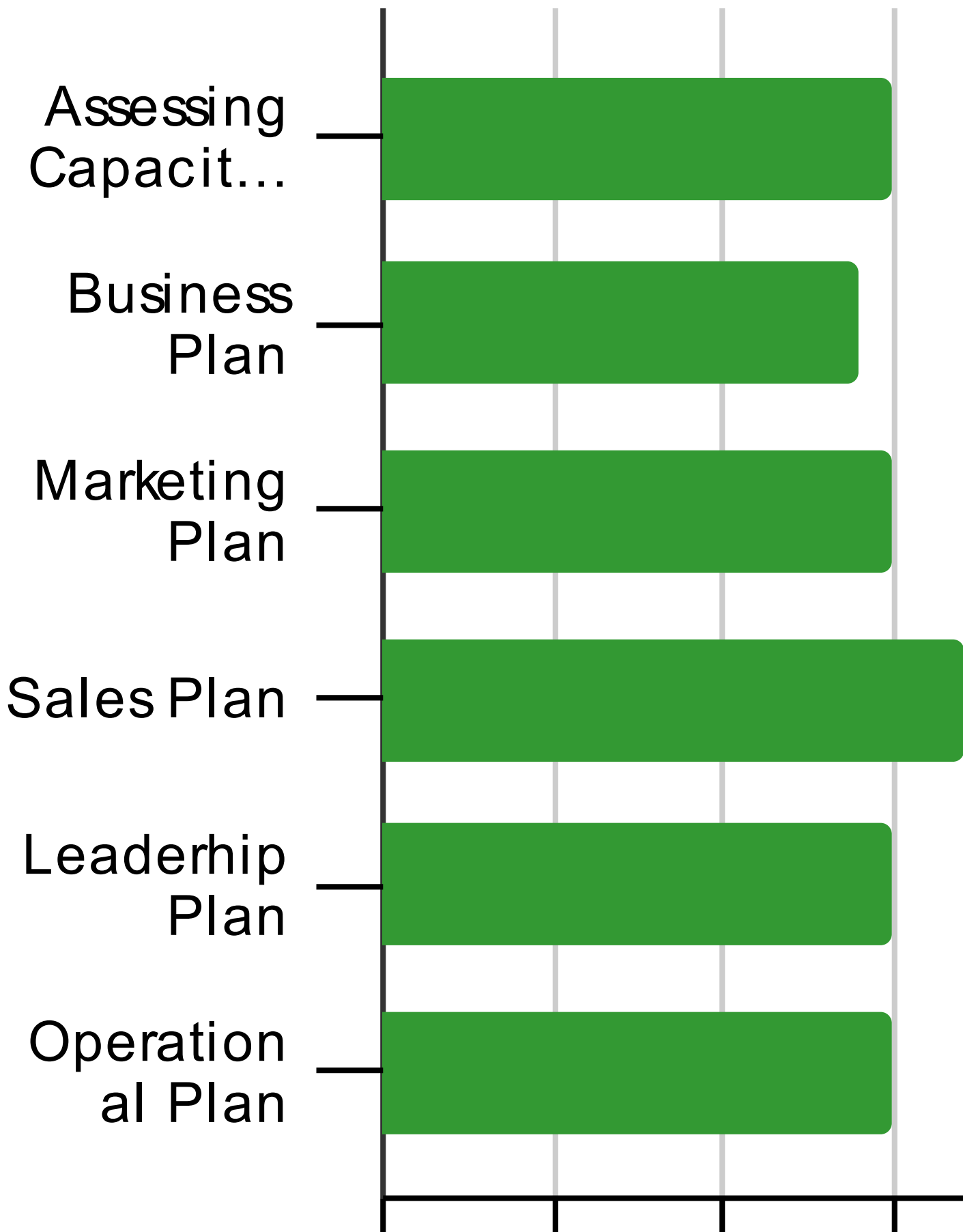
Click On The Coaching Tabs Below Now!

## Business Assessment

How well is your coaching business performing? Take a moment and reflect on how you're doing in each of the Six Core Business Categories. **Grade yourself in each category and then click on the "Business Assessment Results" tab at the bottom of the page.**

| Core Business Categories    | Grade Yourself<br>10 = I'm Failing<br>100 = I'm Perfect | Assessment Scoring System Defined   |
|-----------------------------|---|---|
| Assessing Capacity to Scale | 75  | 100 = We are fully capable of scaling 2-10x in the next 3-5 years. We have the motivation, mindset, skillset and people in place to make it happen.   |
| Business Plan               | 70  | 100 = We have a clear understanding of our vision, mission and purpose. We also have a written plan for our business to fulfill this vision, mission and purpose and we're on target to achieve it.   |
| Marketing Plan              | 75  | 100 = We have a written Marketing Plan that includes a successful marketing system for Lead Generation, In-Process added value opportunities and referral requests as well as ongoing relationship building strategies for strategic business partnerships. We also have a Client Retention program as part of our Customer Relationship Management System that helps us to keep in contact with clients. We're very satisfied with amount of incoming leads and feedback that I'm receiving from our marketing.  |
| Sales Plan                  | 85  | 100 = We are proficient in problem identification, presenting solutions in an easy to understand manner for clients and referral sources and we have memorized scripts to overcome objections and close the sale. We have a working system for following up on all incoming leads and prospective referral sources and we are satisfied with our overall sales abilities. We have implemented a time management system that allows us to focus on our most important priorities each day.   |
| Leadership Plan             | 75  | 100 = We have a strong leadership development plan in place to grow transactionally and transformationally with the business as it grows.   |
| Operational Plan            | 75  | 100 = We have standard processes and procedures in place and in writing to ensure a consistent delivery of Raving Fan customer service and to manage our operational systems effectively. Every person who works on our team has a written job description and we have delegated the areas that are not part of our unique talents, skills and abilities to others so we stay focused on our highest payoff activities. We have the necessary tools, systems and resources needed to accomplish our plan and achieve goals efficiently and effectively. |

**Once Completed Please Click on the "Business Assessment Results" Tab Below!**



# MY LIFE PLAN

In this section identify your dreams (or long term goals) for each of the 8 life categories along with the due date and priority level.

## CAREER DREAMS/GOALS

| Dream/Goal                            | Due Date             | Priority   |
|---------------------------------------|----------------------|------------|
| Enter your life dreams and goals here | insert due date here | A, B, or C |
|                                       |                      |            |
|                                       |                      |            |
|                                       |                      |            |
|                                       |                      |            |
|                                       |                      |            |
|                                       |                      |            |
|                                       |                      |            |
|                                       |                      |            |
|                                       |                      |            |

## EDUCATION/PERSONAL DEVELOPMENT DREAMS/GOALS

| Dream/Goal | Due Date | Priority |
|------------|----------|----------|
|            |          |          |
|            |          |          |
|            |          |          |
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|            |          |          |
|            |          |          |

## FAMILY/RELATIONSHIP DREAMS/GOALS

| Dream/Goal | Due Date | Priority |
|------------|----------|----------|
|            |          |          |
|            |          |          |
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## FINANCIAL DREAMS/GOALS

| Dream/Goal | Due Date | Priority |
|------------|----------|----------|
|            |          |          |
|            |          |          |
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## HEALTH AND FITNESS DREAMS/GOALS

| Dream/Goal | Due Date | Priority |
|------------|----------|----------|
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## PLEASURE/LEISURE DREAMS/GOALS

| Dream/Goal | Due Date | Priority |
|------------|----------|----------|
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|            |          |          |
|            |          |          |

## PUBLIC SERVICE/LEGACY DREAMS/GOALS

| Dream/Goal | Due Date | Priority |
|------------|----------|----------|
|            |          |          |
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|            |          |          |

## SPIRITUAL DREAMS/GOALS

| Dream/Goal | Due Date | Priority |
|------------|----------|----------|
|            |          |          |
|            |          |          |
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|            |          |          |
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## MISSION STATEMENT

(Answer questions below and then create a short 1 paragraph summary mission sentence here)

**EXAMPLE:**

Our mission at XYZ Company is to provide accessible and affordable healthcare solutions to underserved communities, guided by our core values of compassion, integrity, and innovation. We aim to address the healthcare disparities present in low-income areas by offering quality medical services and preventive care initiatives. Through strategic partnerships with local organizations and community outreach programs, we strive to make a positive impact on the well-being of individuals and families. Our commitment to transparency, accountability, and patient-centered care drives every decision we make, as we work towards a future where everyone has equal access to healthcare services and opportunities for a healthier life.

| QUESTION:   | YOUR ANSWERS |
|---|--------------|
| 1. What is the core purpose of your business beyond making a profit?  |              |
| 2. What values and principles guide your business operations and decision-making processes?   |              |
| 3. Who are the primary beneficiaries or stakeholders of your business's products or services?   |              |
| 4. What specific needs or problems does your business aim to address in the market?   |              |
| 5. How does your business contribute to the betterment of society or the community it serves?   |              |
| 6. What sets your business apart from competitors in terms of its mission and impact?   |              |
| 7. What long-term goals or objectives does your business aspire to achieve?   |              |
| 8. How do you envision your business making a positive difference in the lives of its customers or clients?   |              |
| 9. What legacy do you hope your business will leave behind in its industry or field?  |              |
| 10. How do you plan to uphold your mission statement in all aspects of your business operations, from hiring practices to product development and customer service? |              |
| 11. What is the driving force or inspiration behind your business's mission?  |              |
| 12. How do you measure success beyond financial metrics, in alignment with your mission statement?  |              |
| 13. How do you ensure transparency and accountability in fulfilling your business's mission to stakeholders?  |              |
| 14. How do you communicate your mission effectively to employees, customers, investors, and the broader public?   |              |
| 15. How do you adapt your mission statement to evolving market conditions and societal needs while staying true to your core values?                                |              |

## 5 YEAR VISION STATEMENT

(Answer questions below and then create a short 1 paragraph summary vision statement here in the present tense).

Our business is steadily increasing its revenue and profitability with X locations, X team members, \$ in annual revenue, capturing a significant market share, expanding our product or service offerings to meet evolving customer needs, planning to enter and dominate new geographic regions or markets, incorporating cutting-edge technologies into our business operations, scaling our business while prioritizing quality and customer satisfaction. We are implementing talent acquisition and development strategies to support our growth objectives, differentiating our brand and maintaining a competitive edge in the market over the forming strategic partnerships and collaborations to drive growth and innovation, adapting to changes in consumer preferences, industry trends, and regulatory landscapes. We are implementing sustainability and corporate social responsibility initiatives to strengthen our business, investing in infrastructure, technology, and operations to support our growth objectives, leveraging data and analytics to optimize decision-making and performance, introducing customer experience enhancements to increase loyalty and retention, evolving our business's overall impact and legacy in the next five years.

| QUESTION:  | YOUR ANSWERS |
|--|--------------|
| 1. Where do you see your business in terms of revenue and profitability five years from now?   |              |
| 2. What market share do you envision your business capturing within the next five years?   |              |
| 3. How do you plan to expand your product or service offerings over the next five years?   |              |
| 4. What geographic regions or markets do you aim to enter or dominate within the next five years?  |              |
| 5. What technological advancements or innovations do you anticipate incorporating into your business operations over the next five years?          |              |
| 6. How do you plan to scale your business while maintaining quality and customer satisfaction over the next five years?                            |              |
| 7. What talent acquisition and development strategies do you have in place to support your growth objectives over the next five years?             |              |
| 8. How do you plan to differentiate your brand and maintain a competitive edge in the market over the next five years?                             |              |
| 9. What partnerships or collaborations do you envision forming to drive growth and innovation over the next five years?                            |              |
| 10. How do you plan to adapt to changes in consumer preferences, industry trends, and regulatory landscapes over the next five years?              |              |
| 11. What sustainability and corporate social responsibility initiatives do you plan to implement or strengthen over the next five years?           |              |
| 12. What investments in infrastructure, technology, and operations do you plan to make to support your growth objectives over the next five years? |              |
| 13. How do you plan to leverage data and analytics to optimize decision-making and performance over the next five years?                           |              |
| 14. What customer experience enhancements do you plan to introduce to increase loyalty and retention over the next five years?                     |              |
| 15. How do you envision your business's overall impact and legacy evolving over the next five years?   |              |

# Advanced Time Blocking Schedule

## How do I complete the Advanced Time Blocking Schedule?

Step 1: Write in each blank space the activities you'd like to fill your ideal week. Be sure to leave time for planning, faith, family, friends, fun, etc.

Step 2: Print the schedule out and review it often to see how close your staying to your ideal week.

**HINT:** The key experience to this exercise is to conceptualize what your ideal week should look like and then arrange your schedule to pursue it. You won't attain perfection each week but the results from pursuing an ideal week will be quite evident in the amount you accomplish.

|         | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday |
|---------|--------|---------|-----------|----------|--------|----------|--------|
| 5:00am  |        |         |           |          |        |          |        |
| 5:30am  |        |         |           |          |        |          |        |
| 6:00am  |        |         |           |          |        |          |        |
| 6:30am  |        |         |           |          |        |          |        |
| 7:00am  |        |         |           |          |        |          |        |
| 7:30am  |        |         |           |          |        |          |        |
| 8:00am  |        |         |           |          |        |          |        |
| 8:30am  |        |         |           |          |        |          |        |
| 9:00am  |        |         |           |          |        |          |        |
| 9:30am  |        |         |           |          |        |          |        |
| 10:00am |        |         |           |          |        |          |        |
| 10:30am |        |         |           |          |        |          |        |
| 11:00am |        |         |           |          |        |          |        |
| 11:30am |        |         |           |          |        |          |        |
| 12:00pm |        |         |           |          |        |          |        |
| 12:30pm |        |         |           |          |        |          |        |
| 1:00pm  |        |         |           |          |        |          |        |
| 1:30pm  |        |         |           |          |        |          |        |
| 2:00pm  |        |         |           |          |        |          |        |
| 2:30pm  |        |         |           |          |        |          |        |
| 3:00pm  |        |         |           |          |        |          |        |
| 3:30pm  |        |         |           |          |        |          |        |
| 4:00pm  |        |         |           |          |        |          |        |
| 4:30pm  |        |         |           |          |        |          |        |
| 5:00pm  |        |         |           |          |        |          |        |
| 5:30pm  |        |         |           |          |        |          |        |
| 6:00pm  |        |         |           |          |        |          |        |
| 6:30pm  |        |         |           |          |        |          |        |
| 7:00pm  |        |         |           |          |        |          |        |
| 7:30pm  |        |         |           |          |        |          |        |
| 8:00pm  |        |         |           |          |        |          |        |
| 8:30pm  |        |         |           |          |        |          |        |
|         |        |         |           |          |        |          |        |

# Business Goals

## IDENTIFYING AND MONITORING YOUR BUSINESS GOALS

Begin by filling out this worksheet in order to identify your career and financial goals for the upcoming year.

### Your Information

|                         |                 |
|-------------------------|-----------------|
| Name                    | John Doe        |
| Company                 | ABC Financial   |
| Yearly Goals Beginning: | January 1, 2022 |

### Business Goals Questionnaire

### Entries

|   |                     |                  |
|---|---------------------|------------------|
| What is the average revenue you receive per client per transaction?         |                     | <b>\$4,500</b>   |
| How many weeks of vacation would you like to take?                          |                     | <b>5</b>         |
| How many days each week do you want to work?                                |                     | <b>5</b>         |
| How many hours each day do you want to work?                                |                     | <b>6</b>         |
| What % of your leads/contacts do you convert to a presentation appointment? | (Select percentage) | <b>20%</b>       |
| What % of your presentation appointments become paying clients?             | (Select percentage) | <b>95%</b>       |
| What is your desired annual income?   |                     | <b>\$250,000</b> |

To See A Breakdown Analysis of Your Goals Click On The "Goal Analysis" Tab Below





# GOALS RESULTS SHEET

|                         |               |
|-------------------------|---------------|
| Name:                   | John Doe      |
| Company:                | ABC Financial |
| Yearly Goals Beginning: | 1/1/2022      |

| Information                                 | Results   |
|---|-----------|
| Average Revenue Per Client Per Transaction: | \$4,500   |
| Weeks for Vacation:                         | 5         |
| Weeks of Business for Year:                 | 47        |
| Business Days per Week:                     | 5         |
| Business Hours per Day:                     | 6         |
| Total Annual Hours:                         | 1,410     |
| Annual Gross Income Desired:                | \$250,000 |
| Hourly Rate:                                | \$177     |

| Paying Clients Needed to Achieve Your Goals |      |
|---|------|
| Needed per Year                             | 56   |
| Needed per Month                            | 4.6  |
| Needed per Working Weeks                    | 1.2  |
| Needed per Working Day                      | 0.24 |

| Leads/Contacts Needed To Achieve Your Goals |      |
|---|------|
| Needed per Year                             | 292  |
| Needed per Month                            | 24.4 |
| Needed per Working Week                     | 6.2  |
| Needed per Working Day                      | 1.2  |

| Client Presentations Needed To Achieve Your Goals |     |
|---|-----|
| Needed per Year                                   | 58  |
| Needed per Month                                  | 4.9 |
| Needed per Working Week                           | 1.2 |
| Needed per Working Day                            | 0.2 |

To Track Your Goals Click On The "Goal Tracking" Tab Below

# GOALS TRACKING WORKSHEET

|  |                      |
|--|----------------------|
| <b>Name:</b>                                     | <b>John Doe</b>      |
| <b>Company Name:</b>                             | <b>ABC Financial</b> |
| <b>Yearly Goals Beginning:</b>                   | <b>1/1/2022</b>      |
| <b># of New Paying Clients Needed Per Month:</b> | <b>4.63</b>          |
| <b>Average Monthly Income Goal:</b>              | <b>\$20,833</b>      |
| <b>Annual Income Goal:</b>                       | <b>\$250,000</b>     |

**To achieve my career and financial goals, I have committed to the following:**

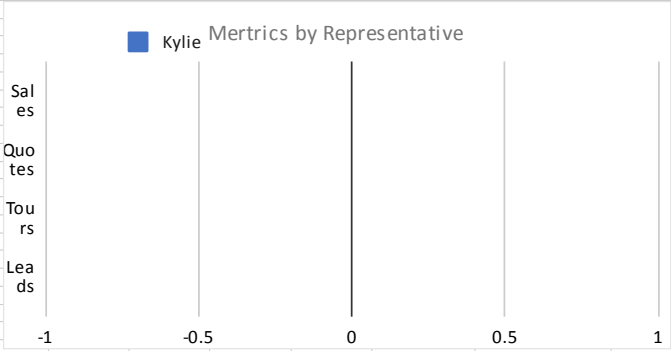
|                         |         |                           |  |  |  |  |  |
|-------------------------|---------|---------------------------|--|--|--|--|--|
| Work                    | 5       | Day(s) per week           |  |  |  |  |  |
| Work                    | 6       | Hour(s) per day           |  |  |  |  |  |
| Take                    | 5       | Week(s) Vacation Per Year |  |  |  |  |  |
| Average annual revenue: | \$4,500 | Per Client                |  |  |  |  |  |

**Weekly Goal Tracking Form**

| <b>Week 1</b>              | <b>Mon</b> | <b>Tues</b> | <b>Wed</b> | <b>Thurs</b> | <b>Fri</b> | <b>Sat</b> | <b>Sun</b> | <b>Goal</b> | <b>Actual</b> |
|----------------------------|------------|-------------|------------|--------------|------------|------------|------------|-------------|---------------|
| Leads/Contacts             |            |             |            |              |            |            |            | 6.2         | 0             |
| Presentation Appointments  |            |             |            |              |            |            |            | 1.2         | 0             |
| New Paying Clients         |            |             |            |              |            |            |            | 1.2         | 0             |
| <b>Week 2</b>              | <b>Mon</b> | <b>Tues</b> | <b>Wed</b> | <b>Thurs</b> | <b>Fri</b> | <b>Sat</b> | <b>Sun</b> | <b>Goal</b> | <b>Actual</b> |
| Leads/Contacts             |            |             |            |              |            |            |            | 6.2         | 0             |
| Presentation Appointments  |            |             |            |              |            |            |            | 1.2         | 0             |
| New Paying Clients         |            |             |            |              |            |            |            | 1.2         | 0             |
| <b>Week 3</b>              | <b>Mon</b> | <b>Tues</b> | <b>Wed</b> | <b>Thurs</b> | <b>Fri</b> | <b>Sat</b> | <b>Sun</b> | <b>Goal</b> | <b>Actual</b> |
| Leads/Contacts             |            |             |            |              |            |            |            | 6.2         | 0             |
| Presentation Appointments  |            |             |            |              |            |            |            | 1.2         | 0             |
| New Paying Clients         |            |             |            |              |            |            |            | 1.2         | 0             |
| <b>Week 4</b>              | <b>Mon</b> | <b>Tues</b> | <b>Wed</b> | <b>Thurs</b> | <b>Fri</b> | <b>Sat</b> | <b>Sun</b> | <b>Goal</b> | <b>Actual</b> |
| Leads/Contacts             |            |             |            |              |            |            |            | 6.2         | 0             |
| Presentation Appointments  |            |             |            |              |            |            |            | 1.2         | 0             |
| New Paying Clients         |            |             |            |              |            |            |            | 1.2         | 0             |
| <b>Week 5</b>              | <b>Mon</b> | <b>Tues</b> | <b>Wed</b> | <b>Thurs</b> | <b>Fri</b> | <b>Sat</b> | <b>Sun</b> | <b>Goal</b> | <b>Actual</b> |
| Leads/Contacts             |            |             |            |              |            |            |            | 6.2         | 0             |
| Presentation Appointments  |            |             |            |              |            |            |            | 1.2         | 0             |
| New Paying Clients         |            |             |            |              |            |            |            | 1.2         | 0             |
| <b>MONTHLY SALES TOTAL</b> |            |             |            |              |            |            |            | <b>4.63</b> | <b>0</b>      |

| P & L Breakdown                              |  | Jan         | Feb         | Mar         | Apr         | May         | June        | July        | Aug         | Sept        | Oct         | Nov         | Dec         | Total        | P & L Breakdown |  |
|--|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|-----------------|--|
| Average Sale Amount                          |  | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$300,000   | \$3,000,000  | \$300,000       | Average Sale Amount                          |
| Number of sales per month                    |  | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 120          | 120             | Number of sales per month                    |
| Sales volume                                 |  | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$3,000,000 | \$36,000,000 | \$36,000,000    | Sales volume                                 |
| Average revenue per sale                     |  | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000      | \$4,000         | Average revenue per sale                     |
| Gross Sales Revenue                          |  | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$40,000    | \$480,000    | \$480,000       | Gross Sales Revenue                          |
| Overhead (from below)                        |  | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$11,550    | \$138,600    | \$138,600       | Overhead (from below)                        |
| Average Sales Commission %                   |  | 70%         | 70%         | 70%         | 70%         | 70%         | 70%         | 70%         | 70%         | 70%         | 70%         | 70%         | 70%         | 70%          | 70%             | Average Sales Commission %                   |
| Average Sales Commission Total               |  | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$28,000    | \$336,000    | \$336,000       | Average Sales Commission Total               |
| Gross profit                                 |  | \$400       | \$400       | \$400       | \$400       | \$400       | \$400       | \$400       | \$400       | \$400       | \$400       | \$400       | \$400       | \$4,800      | \$4,800         | Gross profit                                 |
| Profit percentage                            |  | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%          | 1%           | 1%              | Profit percentage                            |
| <b>Office Expenses</b>                       |  |             |             |             |             |             |             |             |             |             |             |             |             |              |                 | <b>Office Expenses</b>                       |
| Staff (benefits included)                    |  | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$4,000     | \$48,000     | \$48,000        | Staff (benefits included)                    |
| Assistant / Receptionist (benefits included) |  | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$2,000     | \$24,000     | \$24,000        | Assistant / Receptionist (benefits included) |
| Misc. Expenses                               |  | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$6,000      | \$6,000         | Misc. Expenses                               |
| Rent   |  | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$1,500     | \$18,000     | \$18,000        | Rent   |
| Utilities                                    |  | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$3,000      | \$3,000         | Utilities                                    |
| Phone  |  | \$600       | \$600       | \$600       | \$600       | \$600       | \$600       | \$600       | \$600       | \$600       | \$600       | \$600       | \$600       | \$7,200      | \$7,200         | Phone  |
| Advertising, Marketing                       |  | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$1,000     | \$12,000     | \$12,000        | Advertising, Marketing                       |
| Legal  |  | \$100       | \$100       | \$100       | \$100       | \$100       | \$100       | \$100       | \$100       | \$100       | \$100       | \$100       | \$100       | \$1,200      | \$1,200         | Legal  |
| Conferences                                  |  | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$2,400      | \$2,400         | Conferences                                  |
| Leases, equipment, software, etc.            |  | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$250       | \$3,000      | \$3,000         | Leases, equipment, software, etc.            |
| Office supplies                              |  | \$150       | \$150       | \$150       | \$150       | \$150       | \$150       | \$150       | \$150       | \$150       | \$150       | \$150       | \$150       | \$1,800      | \$1,800         | Office supplies                              |
| Misc. (postage, subscriptions)               |  | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$200       | \$2,400      | \$2,400         | Misc. (postage, subscriptions)               |
| Tech Support                                 |  | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$500       | \$6,000      | \$6,000         | Tech Support                                 |
| Training, Recruiting, etc.                   |  | \$300       | \$300       | \$300       | \$300       | \$300       | \$300       | \$300       | \$300       | \$300       | \$300       | \$300       | \$300       | \$3,600      | \$3,600         | Training, Recruiting, etc.                   |
| <b>Grand Total of Expenses</b>               |  | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$11,850    | \$138,600    | \$138,600       | <b>Grand Total of Expenses</b>               |

|                | Leads | Tours | Quotes | Sales | Dollars | Leads to Conversations | Tours to Sales | Leads to Sales |  |  |  |  |  |  |
|----------------|-------|-------|--------|-------|---------|------------------------|----------------|----------------|--|--|--|--|--|--|
| Salesperson #1 |       |       |        |       | \$ -    | 0%                     | 0%             | 0%             |  |  |  |  |  |  |
| Salesperson #2 |       |       |        |       | \$ -    | 0%                     | 0%             | 0%             |  |  |  |  |  |  |
| Salesperson #3 |       |       |        |       | \$ -    | 0%                     | 0%             | 0%             |  |  |  |  |  |  |
| Salesperson #4 |       |       |        |       | \$ -    | 0%                     | 0%             | 0%             |  |  |  |  |  |  |
| Salesperson #5 |       |       |        |       | \$ -    | 0%                     | 0%             | 0%             |  |  |  |  |  |  |
| Salesperson #6 |       |       |        |       | \$ -    | 0%                     | 0%             | 0%             |  |  |  |  |  |  |
|                | 0     | 0     | 0      | 0     | \$ -    |                        |                |                |  |  |  |  |  |  |











## Life and Business Planning

| Done? | Items to do   | Due By |
|-------|---|--------|
|       | <b>1. Schedule a day in your time management system</b> to Create or Refine Your Life and Business Plan   |        |
|       | <b>2. Complete the Life Plan</b> tab and clarify your personal goals and dreams.  |        |
|       | <b>3. Create an Action Plan and Due Dates</b> for each of the goals and action steps you establish inside both your life and business plan  |        |
|       | <b>4. Complete Your Business Plan and Financial Scorecard</b> to focus on what matters most   |        |
|       | <b>5. Create a 12 Month Pro-Forma:</b> Project your monthly/yearly expenses and estimated revenues using the "Pro-Forma" worksheet inside this workbook to gain a clear understanding of what it will take to hit your profitability goals. |        |
|       | <b>6. Re-take this assessment in 90 days</b> and see if you've improved in the Life & Business Plan category  |        |
|       | <b>7. Visit <a href="http://www.GrowMyProfit.com">www.GrowMyProfit.com</a> for additional input and/or perspective</b>  |        |
|       | Other:  |        |
|       |   |        |
|       |   |        |

# Ideal Client Profile

| QUESTION:  | YOUR ANSWERS |
|--|--------------|
| 1. What demographics best describe your ideal client (age, gender, income level, education, etc.)?   |              |
| 2. What are the primary pain points or challenges your ideal clients face that your business can solve?  |              |
| 3. Where do your ideal clients spend their time online (social media platforms, forums, blogs, etc.)?  |              |
| 4. What are the key interests, hobbies, or lifestyle characteristics of your ideal clients?  |              |
| 5. What are the common values or beliefs shared by your ideal clients?   |              |
| 6. What motivates your ideal clients to make purchasing decisions (price, quality, convenience, status, etc.)?                                   |              |
| 7. Who are your current satisfied clients, and what commonalities do they share?   |              |
| 8. What are the geographic locations or regions where your ideal clients are concentrated?   |              |
| 9. What industry or niche are your ideal clients primarily involved in?  |              |
| 10. What are the communication preferences of your ideal clients (email, phone calls, social media messaging, etc.)?                             |              |
| 11. What are the buying behaviors or patterns of your ideal clients (frequency of purchase, preferred payment methods, etc.)?                    |              |
| 12. What are the primary goals or aspirations of your ideal clients, and how does your business align with them?                                 |              |
| 13. What are the objections or hesitations your ideal clients might have about purchasing your product or service, and how can you address them? |              |
| 14. What feedback or testimonials do you have from past clients that can provide insights into your ideal client profile?                        |              |
| 15. How do your ideal clients perceive your competitors, and what factors differentiate your business in their eyes?                             |              |

## S.W.O.T. ANALYSIS & U.V.P.

Identify Your Corporate Strengths, Weaknesses, Opportunities and Threats

### STRENGTHS

|  |
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### WEAKNESSES

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### OPPORTUNITIES

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### THREATS

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### What is your Unique Value Proposition?

To develop a strong UVP, start by identifying the unique features and benefits of your product or service. Next, consider the needs and wants of your target market and how your product or service meets those needs. Finally, craft a clear and concise statement that communicates the value that your product or service provides.

### YOUR UNIQUE VALUE PROPOSITION

|  |
|--|
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|  |  |  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|--|--|
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|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

# MY MARKETING PLAN

In this section identify you marketing targets, how you will reach them, how often and how much your marketing will cost.

| TARGET #1        |            |           |      |
|------------------|------------|-----------|------|
| Phase            | Activities | Frequency | Cost |
| Lead Generation  | Post Card  |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Total            |            |           | \$0  |

| TARGET #5        |            |           |      |
|------------------|------------|-----------|------|
| Phase            | Activities | Frequency | Cost |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Total            |            |           | \$0  |

| TARGET #2        |            |           |      |
|------------------|------------|-----------|------|
| Phase            | Activities | Frequency | Cost |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Total            |            |           | \$0  |

| TARGET #6        |            |           |      |
|------------------|------------|-----------|------|
| Phase            | Activities | Frequency | Cost |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Total            |            |           | \$0  |

| TARGET #3        |            |           |      |
|------------------|------------|-----------|------|
| Phase            | Activities | Frequency | Cost |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Total            |            |           | \$0  |

| TARGET #7        |            |           |      |
|------------------|------------|-----------|------|
| Phase            | Activities | Frequency | Cost |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Total            |            |           | \$0  |

| TARGET #4        |            |           |      |
|------------------|------------|-----------|------|
| Phase            | Activities | Frequency | Cost |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| Lead Generation  |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| In Process       |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Client Retention |            |           |      |
| Total            |            |           | \$0  |

| TARGET #8 - OTHER |            |           |      |
|-------------------|------------|-----------|------|
| Phase             | Activities | Frequency | Cost |
| Lead Generation   |            |           |      |
| Lead Generation   |            |           |      |
| Lead Generation   |            |           |      |
| In Process        |            |           |      |
| In Process        |            |           |      |
| In Process        |            |           |      |
| Client Retention  |            |           |      |
| Client Retention  |            |           |      |
| Client Retention  |            |           |      |
| Total             |            |           | \$0  |

**Total Marketing Budget = \$0**

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Marketing Phase

Lead Generation  
In Process  
Client Retention

Your Frequency

Daily  
Weekly  
Bi-Monthly  
Monthly  
Every Other Month  
Quarterly  
Semi-Annually  
Annually

Your Activities

Direct Mail  
Post Card  
Newsletter  
Email  
Newspaper Ad  
Seminar  
Tele-Marketing  
Call Capture  
Blog  
Podcast  
Internet Leads  
  
Radio/TV Ads  
Internet Ads  
Special Event  
Lunch Meeting  
Associations  
Chamber

**MARKETING CALENDAR**

Identify and schedule the release of your marketing materials.

| JANUARY        |       |      |      |
|----------------|-------|------|------|
| Action         | Notes | Due  | Done |
| Newsletter     |       | 1st  |      |
| Post Card      |       | 6th  |      |
| Direct Mail    |       | 9th  |      |
| Seminar        |       | 12th |      |
| Tele-Marketing |       | 15th |      |
| Internet Leads |       | 18th |      |
| Radio/TV Ads   |       | 21st |      |
| Special Event  |       | 24th |      |
| Blog           |       | 27th |      |

| FEBRUARY |       |      |      |
|----------|-------|------|------|
| Action   | Notes | Due  | Done |
|          |       | 1st  |      |
|          |       | 6th  |      |
|          |       | 9th  |      |
|          |       | 12th |      |
|          |       | 15th |      |
|          |       | 18th |      |
|          |       | 21st |      |
|          |       | 24th |      |
|          |       | 27th |      |

| MARCH  |       |      |      |
|--------|-------|------|------|
| Action | Notes | Due  | Done |
|        |       | 1st  |      |
|        |       | 6th  |      |
|        |       | 9th  |      |
|        |       | 12th |      |
|        |       | 15th |      |
|        |       | 18th |      |
|        |       | 21st |      |
|        |       | 24th |      |
|        |       | 27th |      |

| APRIL  |       |      |      |
|--------|-------|------|------|
| Action | Notes | Due  | Done |
|        |       | 1st  |      |
|        |       | 6th  |      |
|        |       | 9th  |      |
|        |       | 12th |      |
|        |       | 15th |      |
|        |       | 18th |      |
|        |       | 21st |      |
|        |       | 24th |      |
|        |       | 27th |      |

| MAY    |       |      |      |
|--------|-------|------|------|
| Action | Notes | Due  | Done |
|        |       | 1st  |      |
|        |       | 6th  |      |
|        |       | 9th  |      |
|        |       | 12th |      |
|        |       | 15th |      |
|        |       | 18th |      |
|        |       | 21st |      |
|        |       | 24th |      |
|        |       | 27th |      |

| JUNE   |       |      |      |
|--------|-------|------|------|
| Action | Notes | Due  | Done |
|        |       | 1st  |      |
|        |       | 6th  |      |
|        |       | 9th  |      |
|        |       | 12th |      |
|        |       | 15th |      |
|        |       | 18th |      |
|        |       | 21st |      |
|        |       | 24th |      |
|        |       | 27th |      |

| JULY   |       |      |      |
|--------|-------|------|------|
| Action | Notes | Due  | Done |
|        |       | 1st  |      |
|        |       | 6th  |      |
|        |       | 9th  |      |
|        |       | 12th |      |
|        |       | 15th |      |
|        |       | 18th |      |
|        |       | 21st |      |
|        |       | 24th |      |
|        |       | 27th |      |

| AUGUST |       |      |      |
|--------|-------|------|------|
| Action | Notes | Due  | Done |
|        |       | 1st  |      |
|        |       | 6th  |      |
|        |       | 9th  |      |
|        |       | 12th |      |
|        |       | 15th |      |
|        |       | 18th |      |
|        |       | 21st |      |
|        |       | 24th |      |
|        |       | 27th |      |

| SEPTEMBER |       |      |      |
|-----------|-------|------|------|
| Action    | Notes | Due  | Done |
|           |       | 1st  |      |
|           |       | 6th  |      |
|           |       | 9th  |      |
|           |       | 12th |      |
|           |       | 15th |      |
|           |       | 18th |      |
|           |       | 21st |      |
|           |       | 24th |      |
|           |       | 27th |      |

| OCTOBER |       |      |      |
|---------|-------|------|------|
| Action  | Notes | Due  | Done |
|         |       | 1st  |      |
|         |       | 6th  |      |
|         |       | 9th  |      |
|         |       | 12th |      |
|         |       | 15th |      |
|         |       | 18th |      |
|         |       | 21st |      |
|         |       | 24th |      |
|         |       | 27th |      |

| NOVEMBER |       |      |      |
|----------|-------|------|------|
| Action   | Notes | Due  | Done |
|          |       | 1st  |      |
|          |       | 6th  |      |
|          |       | 9th  |      |
|          |       | 12th |      |
|          |       | 15th |      |
|          |       | 18th |      |
|          |       | 21st |      |
|          |       | 24th |      |
|          |       | 27th |      |

| DECEMBER |       |      |      |
|----------|-------|------|------|
| Action   | Notes | Due  | Done |
|          |       | 1st  |      |
|          |       | 6th  |      |
|          |       | 9th  |      |
|          |       | 12th |      |
|          |       | 15th |      |
|          |       | 18th |      |
|          |       | 21st |      |
|          |       | 24th |      |
|          |       | 27th |      |

**LIST OF "ACTIONS"**

- Direct Mail
- Post Card
- Newsletter
- Email
- Newspaper Ad
- Seminar
- Tele-Marketing
- Call Capture
- Blog
- Podcast
- Internet Leads
- Radio/TV Ads
- Internet Ads
- Special Event
- (insert activity)
- (insert activity)
- (insert activity)

- Due Dates
- 1st
  - 2nd
  - 3rd
  - 4th
  - 5th
  - 6th
  - 7th
  - 8th
  - 9th
  - 10th
  - 11th
  - 12th
  - 13th
  - 14th
  - 15th
  - 16th
  - 17th
  - 18th
  - 19th
  - 20th
  - 21st
  - 22nd
  - 23rd
  - 24th
  - 25th
  - 26th
  - 27th
  - 28th
  - 29th
  - 30th
  - 31st

**SOURCE TRACKING - WHERE IS YOUR BUSINESS COMING FROM?**

| Month:              | Jan      | Feb      | Mar      | Apr      | May      | June     | July     | Aug      | Sept     | Oct      | Nov      | Dec      | Totals   | %   |
|---------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----|
| <b>Source:</b>      |          |          |          |          |          |          |          |          |          |          |          |          |          |     |
| Past Clients        | 1        |          |          |          |          |          |          |          |          |          |          |          | 1        | 50% |
| Friends             | 1        |          |          |          |          |          |          |          |          |          |          |          | 1        | 50% |
| Relatives           |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Website             |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Email Marketing     |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Seminars            |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Direct Mail         |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Chamber             |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Articles            |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Corporate Marketing |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Associations        |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Other:              |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Other:              |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Other:              |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Other:              |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Other:              |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Other:              |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| Other:              |          |          |          |          |          |          |          |          |          |          |          |          | 0        | 0%  |
| <b>Totals</b>       | <b>2</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>2</b> |     |

## Marketing Strategies

| Done? | Items to do   | Due By |
|-------|---|--------|
|       | <b>1. Schedule time into your time management system</b> to improve your marketing skills and strategies and to spend time each week in marketing specific activities.  |        |
|       | <b>2. Create Your Marketing Plan:</b> If you haven't developed your "Marketing Plan" please go back to the previous tabs to create your plan and then develop your "Marketing Calendar".  |        |
|       | <b>3. Update Your Marketing Plan with Lead Generation, In-Process and Client Retention Strategies:</b> To build a steady flow of incoming leads you should market your business during each of these phases to maximize your lead generation opportunities.   |        |
|       | <b>3a. Lead Generation:</b> These strategies include all marketing tactics you will use to generate new relationships with prospects you currently do not have a personal relationship with (i.e. newspaper ads, articles you write, blogging, podcasting, direct mail, etc).   |        |
|       | <b>3b. In-Process Marketing:</b> These strategies include all marketing and referral strategies you deploy while coaching a clients (i.e. thank you letters, referral requests, added value gifts, etc).  |        |
|       | <b>3c. Client Retention:</b> These strategies included all marketing and referral strategies you deploy after you have concluded a coaching relationship with a client to improve the possibilities of coaching that client in the future and/or receiving referrals from them.   |        |
|       | <b>4. Review and Measure Results:</b> Establish a tracking system inside your standard process to ensure you capture the source (referral and/or marketing) on every lead that comes in and measure what strategies are pulling the best response and closing ratios. Use the previous tab labeled "Source Tracking" to tally the results at the end of each week or month and then reviewing the results on a consistent basis. Once results have been established spend more time and money on the ones that are working or try a new strategy from the community to better connect with your marketplace |        |
|       | <b>5. Visit <a href="http://www.GrowMyProfit.com">www.GrowMyProfit.com</a> for additional input and/or perspective</b>  |        |
|       | Other:  |        |
|       |   |        |
|       |   |        |

**Top Referral List**

List Your Top Referral Sources In Order of Priority (A, B and C)

Date: \_\_\_\_\_

| P | Business Owners | P           | Friends       | P                  | Relatives     | P         | Chamber Members | P               | HR Managers   | P | Top Clients   |
|---|-----------------|-------------|---------------|--------------------|---------------|-----------|-----------------|-----------------|---------------|---|---------------|
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   | Hot Prospects   |             | Hot Prospects |                    | Hot Prospects |           | Hot Prospects   |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   | P               | Accountants | P             | Financial Planners | P             | Attorneys | P               | Insurance Agt's |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   | Hot Prospects   |             | Hot Prospects |                    | Hot Prospects |           | Hot Prospects   |                 | Hot Prospects |   | Hot Prospects |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
|   |                 |             |               |                    |               |           |                 |                 |               |   |               |
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|   |                 |             |               |                    |               |           |                 |                 |               |   |               |

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## Referral Partnerships

| Done? | Items to do   | Due By |
|-------|---|--------|
|       | <b>1. Schedule time into your time management system</b> to improve your Referral Partnerships  |        |
|       | <b>2. Build Your Top Referral List:</b> Go to the previous tab named "Top Referral Source" and add the names of your top referral sources or prospects under each of the referral categories listed to get laser focused on who your top referral sources and prospects are in each area          |        |
|       | <b>3. The Approach:</b> Develop a :30 second "Elevator Speech" to help you approach more clients and referral sources to establish credibility. Create and refine your competitive advantages and your unique selling proposition.  |        |
|       | <b>4. Presenting:</b> Review and revise your current referral source presentation. Does it include personal testimonials, a review of the referral sources goals/objectives, easy to understand visual aid/graphs/charts and beneficial solutions that would compel them to do business with you? |        |
|       | <b>5. Overcoming Objections:</b> Do you know what your most common objections are from clients and prospective referral partners? List out the top 5-10 objections and script out a response that will help you overcome these objections and then memorize the scripts.                          |        |
|       | <b>6. Closing Techniques:</b> Do you know how to close the sale? Script out your closing techniques to assist you in helping customer to make the decision to purchase and then memorize the scripts.   |        |
|       | <b>7. Following up:</b> Schedule specific times during the day, week and/or month to focus on following up with your top referral sources   |        |
|       | <b>8. Visit <a href="http://www.GrowMyProfit.com">www.GrowMyProfit.com</a> for additional input and/or perspective</b>  |        |
|       | <b>Other:</b>   |        |
|       |   |        |
|       |   |        |
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# Team Member Coaching

My Performance Review Dates Are The Following: 1/15, 4/15, 7/15, 9/15

| Rank | Name | Grade | What you can do to improve their performance... |
|------|------|-------|---|
| 1    |      |       |   |
| 2    |      |       |   |
| 3    |      |       |   |
| 4    |      |       |   |
| 5    |      |       |   |
| 6    |      |       |   |
| 7    |      |       |   |
| 8    |      |       |   |
| 9    |      |       |   |
| 10   |      |       |   |
| 11   |      |       |   |
| 12   |      |       |   |
| 13   |      |       |   |
| 14   |      |       |   |
| 15   |      |       |   |
| 16   |      |       |   |
| 17   |      |       |   |
| 18   |      |       |   |
| 19   |      |       |   |
| 20   |      |       |   |
| 21   |      |       |   |
| 22   |      |       |   |
| 23   |      |       |   |
| 24   |      |       |   |
| 25   |      |       |   |

# Recruiting Targets

Who are your top candidates you'd like to join your team?

| Rank | Name | Grade | What's your next step to attract them to join your team? |
|------|------|-------|--|
| 1    |      |       |  |
| 2    |      |       |  |
| 3    |      |       |  |
| 4    |      |       |  |
| 5    |      |       |  |
| 6    |      |       |  |
| 7    |      |       |  |
| 8    |      |       |  |
| 9    |      |       |  |
| 10   |      |       |  |
| 11   |      |       |  |
| 12   |      |       |  |
| 13   |      |       |  |
| 14   |      |       |  |
| 15   |      |       |  |
| 16   |      |       |  |
| 17   |      |       |  |
| 18   |      |       |  |
| 19   |      |       |  |
| 20   |      |       |  |
| 21   |      |       |  |
| 22   |      |       |  |
| 23   |      |       |  |
| 24   |      |       |  |
| 25   |      |       |  |

**MY TRAINING PLAN**

In this section identify your training plan, how often and how much your training will cost.

| POSITION GROUP #1 |                      |              |      |
|-------------------|----------------------|--------------|------|
| Phase             | Activities           | Frequency    | Cost |
| Orientation       | Orientation Training | Single Event |      |
| Orientation       | Online Training      | Single Event |      |
| Ongoing           | Weekly Meetings      | Weekly       |      |
| Ongoing           | Mentoring            | Weekly       |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Advanced          |                      |              |      |
| Advanced          |                      |              |      |
| Advanced          |                      |              |      |
| Total             |                      |              | \$0  |

| POSITION GROUP #3 |                      |              |      |
|-------------------|----------------------|--------------|------|
| Phase             | Activities           | Frequency    | Cost |
| Orientation       | Orientation Training | Single Event |      |
| Orientation       | Online Training      | Single Event |      |
| Ongoing           | Weekly Meetings      | Weekly       |      |
| Ongoing           | Mentoring            | Weekly       |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Advanced          |                      |              |      |
| Advanced          |                      |              |      |
| Advanced          |                      |              |      |
| Total             |                      |              | \$0  |

| POSITION GROUP #2 |                  |              |      |
|-------------------|------------------|--------------|------|
| Phase             | Activities       | Frequency    | Cost |
| Orientation       | Boot Camp        | Single Event |      |
| Orientation       | Conference Calls | Single Event |      |
| Ongoing           | Company Website  | Weekly       |      |
| Ongoing           | One on One       | Weekly       |      |
| Ongoing           |                  |              |      |
| Ongoing           |                  |              |      |
| Ongoing           |                  |              |      |
| Ongoing           |                  |              |      |
| Advanced          |                  |              |      |
| Advanced          |                  |              |      |
| Advanced          |                  |              |      |
| Total             |                  |              | \$0  |

| POSITION GROUP #4 |                      |              |      |
|-------------------|----------------------|--------------|------|
| Phase             | Activities           | Frequency    | Cost |
| Orientation       | Orientation Training | Single Event |      |
| Orientation       | Online Training      | Single Event |      |
| Ongoing           | Weekly Meetings      | Weekly       |      |
| Ongoing           | Mentoring            | Weekly       |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Ongoing           |                      |              |      |
| Advanced          |                      |              |      |
| Advanced          |                      |              |      |
| Advanced          |                      |              |      |
| Total             |                      |              | \$0  |

**Total Training Budget = \$0**

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- Marketing Phase**
- Orientation
- Ongoing
- Advanced
- Your Frequency**
- Single Event
- Daily
- Weekly
- Bi-Monthly
- Monthly
- Every Other Month
- Quarterly
- Semi-Annually
- Annually
- Your Activities**
- Boot Camp
- Conference Calls
- Company Website
- Mentoring
- One on One
- Online Training
- Orientation Training
- Podcasts
- Sales Conference
- Self Study
- Shadowing
- 1-Day Seminar
- 2-Day Seminar
- 3-Day Seminar
- Special Event
- Webinar
- Weekly Meetings

# TRAINING CALENDAR

Identify and schedule your training programs for the upcoming year.

| JANUARY |       |      |      |
|---------|-------|------|------|
| Topic   | Notes | Date | Done |
|         |       |      |      |
|         |       |      |      |
|         |       |      |      |
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|         |       |      |      |

| JULY  |       |      |      |
|-------|-------|------|------|
| Topic | Notes | Date | Done |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
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|       |       |      |      |
|       |       |      |      |

| FEBRUARY |       |      |      |
|----------|-------|------|------|
| Topic    | Notes | Date | Done |
|          |       |      |      |
|          |       |      |      |
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|          |       |      |      |
|          |       |      |      |

| AUGUST |       |      |      |
|--------|-------|------|------|
| Topic  | Notes | Date | Done |
|        |       |      |      |
|        |       |      |      |
|        |       |      |      |
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|        |       |      |      |
|        |       |      |      |

| MARCH |       |      |      |
|-------|-------|------|------|
| Topic | Notes | Date | Done |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
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|       |       |      |      |
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|       |       |      |      |

| SEPTEMBER |       |      |      |
|-----------|-------|------|------|
| Topic     | Notes | Date | Done |
|           |       |      |      |
|           |       |      |      |
|           |       |      |      |
|           |       |      |      |
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|           |       |      |      |
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|           |       |      |      |
|           |       |      |      |
|           |       |      |      |

| APRIL |       |      |      |
|-------|-------|------|------|
| Topic | Notes | Date | Done |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
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|       |       |      |      |
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|       |       |      |      |
|       |       |      |      |

| OCTOBER |       |      |      |
|---------|-------|------|------|
| Topic   | Notes | Date | Done |
|         |       |      |      |
|         |       |      |      |
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|         |       |      |      |
|         |       |      |      |

| MAY   |       |      |      |
|-------|-------|------|------|
| Topic | Notes | Date | Done |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
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|       |       |      |      |
|       |       |      |      |
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|       |       |      |      |
|       |       |      |      |

| NOVEMBER |       |      |      |
|----------|-------|------|------|
| Topic    | Notes | Date | Done |
|          |       |      |      |
|          |       |      |      |
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|          |       |      |      |
|          |       |      |      |

| JUNE  |       |      |      |
|-------|-------|------|------|
| Topic | Notes | Date | Done |
|       |       |      |      |
|       |       |      |      |
|       |       |      |      |
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|       |       |      |      |
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|       |       |      |      |
|       |       |      |      |

| DECEMBER |       |      |      |
|----------|-------|------|------|
| Topic    | Notes | Date | Done |
|          |       |      |      |
|          |       |      |      |
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|          |       |      |      |
|          |       |      |      |

## Sales Plan

| Done? | Items to do   | Due By |
|-------|---|--------|
|       | <b>1. Schedule time into your time management system</b> to improve your sales skills to improve your prospect to closing conversion ratios and begin increasing your income today!   |        |
|       | <b>2. Prospecting:</b> Develop a standard profile of your ideal client/customer to help you clearly focus on who you should be prospecting.   |        |
|       | <b>3. The Approach:</b> Develop a :30 second "Elevator Speech" to help you approach more clients and referral sources to establish credibility. Create and refine your competitive advantages and your unique selling proposition.  |        |
|       | <b>4. Presenting:</b> Review and revise your current referral source presentation. Does it include personal testimonials, a review of the referral sources goals/objectives, easy to understand visual aid/graphs/charts and beneficial solutions that would compel them to do business with you? |        |
|       | <b>5. Overcoming Objections:</b> Do you know what your most common objections are from clients and prospective referral partners? List out the top 5-10 objections and script out a response that will help you overcome these objections and then memorize the scripts.                          |        |
|       | <b>6. Closing Techniques:</b> Do you know how to close the sale? Script out your closing techniques to assist you in helping customer to make the decision to purchase and then memorize the scripts.   |        |
|       | <b>7. Following up:</b> Schedule specific times during the day, week and/or month to focus on following up with your top referral sources   |        |
|       | <b>8. Following up:</b> Schedule specific times during the day, week and/or month to focus on following up with past prospects and associated leads   |        |
|       | <b>9. Customer Service:</b> Create your own "Customer Service Checklist" on the key contact points where you can create Raving Fans   |        |
|       | <b>10. Time Management:</b> Complete the "Time Blocking Schedule" form on the next Tab (Time Blocking) and complete your "Perfect Week" by adding in your highest payoff and highest priorities to gain the focus you need to succeed   |        |
|       | <b>11. Visit <a href="http://www.GrowMyProfit.com">www.GrowMyProfit.com</a> for additional input and/or perspective</b>   |        |
|       | Other:  |        |
|       |   |        |
|       |   |        |

|  |                 |  |                     |               |
|--|-----------------|--|---------------------|---------------|
|  |                 |  | Shareholders/Family |               |
|  |                 |  |                     |               |
|  |                 |  | Board               |               |
|  |                 |  |                     |               |
|  |                 |  | CEO                 |               |
|  |                 |  |                     |               |
|  | VP of Sales     |  | V.P. of Ops         | V.P. of Admin |
|  |                 |  |                     |               |
|  | Sales Manager   |  | Ops Staff           | Admin Staff   |
|  |                 |  |                     |               |
|  | Sales Staff     |  |                     |               |
|  |                 |  |                     |               |
|  | Marketng Mgr    |  |                     |               |
|  |                 |  |                     |               |
|  | Marketing Staff |  |                     |               |

## Leadership Plan

| Done? | Items to do   | Due By |
|-------|---|--------|
|       | <b>1. Schedule time into your time management system</b> to improve your leadership skills today!   |        |
|       | <b>2. Habits</b> – Clarify the leadership habits you want to see throughout your organization   |        |
|       | <b>3. Priority Management</b> – Create time blocks for your highest leadership priorities and organize your calendar to match your goals and what matters most to you.  |        |
|       | <b>4. Peak Performance Culture</b> – Define your cultural standards and the environment you wish to create.   |        |
|       | <b>5. Organizational Chart</b> – Create an organization chart with clear communication path and defined job descriptions.   |        |
|       | <b>6. Common Leadership Issues</b> – Identify the most common leadership issues, challenges and barriers you're experiencing and next steps for each of them using "What happened?, What did we want to happen? What's missing? and What's next?" as a framework. |        |
|       | <b>7. Visit <a href="http://www.GrowMyProfit.com">www.GrowMyProfit.com</a></b> for additional input and/or perspective  |        |
|       | Other:  |        |
|       |   |        |
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## Operations Plan

| Done? | Items to do  | Due By |
|-------|--|--------|
|       | <b>1. Schedule time into your time management system</b> to improve your operational systems and increase your efficiency and effectiveness today!   |        |
|       | <b>2. Technology:</b> Are you leveraging technology in your business to increase your available time each day to do your highest payoff activities? Begin researching strategies to leverage technology to simplify your business.   |        |
|       | <b>3. Process Flow:</b> Do you have a complete breakdown of the Process Flow of your standard processes and procedures? Top businesses know who is doing what, when, why and how. Start a process manual today by breaking down standard processes into checklists, forms or scripts to simplify your training of new employees and improve your |        |
|       | <b>4. Client Retention Checklist:</b> Do you have a process for what sales and marketing activities need to be done to ensure your client's will remember you in the future after you make the sale? Develop your Client Retention Checklist today!  |        |
|       | <b>5. Team Members Resources:</b> Do you have a complete job description for your team members/assistant(s)? Their success and your enjoyment in their work comes from knowing what their responsibilities are each and every day. Create standard job descriptions for each team member and watch your employees begin to smile again.          |        |
|       | <b>6. Workspace Organization:</b> Review the functionality of your current workspace/office and make adjustments as necessary to improve your efficiency and effectiveness such as organizing file drawers, setting up a filing system to better organize paperwork on your desk.  |        |
|       | <b>7. Visit <a href="http://www.GrowMyProfit.com">www.GrowMyProfit.com</a></b> for additional input and/or perspective   |        |
|       | Other:   |        |
|       |  |        |
|       |  |        |