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 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 10 = I'm Failing 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.
Leaderhip 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 id	entify your dreams (or long to	erm goals) for e	ach of the 8 life categories along with the di	ue date and priority level.	
CAREER DREAMS/GOALS			EDUCATION/PERSONAL DEVELOPM		
Dream/Goal	Due Date	Priority	Dream/Goal	Due Date	Priority
Enter your life dreams and goals here	insert due date here	A, B, or C			
	_				
FAMILY/RELATIONSHIP DREAMS/GOAL			FINANCIAL DREAMS/GOALS		
Dream/Goal	Due Date	Priority	Dream/Goal	Due Date	Priority
HEALTH AND FITNESS DREAMS/GOALS	8		PLEASURE/LEISURE DREAMS/GOAL	S	
Dream/Goal	Due Date	Priority	Dream/Goal	Due Date	Priority
	240 2410			240 2410	
PUBLIC SERVICE/LEGACY DREAMS/GO			SPIRITUAL DREAMS/GOALS		
Dream/Goal	Due Date	Priority	Dream/Goal	Due Date	Priority
·	Copyrigh	t 2024 GrowMy	Profit.com. All Rights Reserved.		

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.

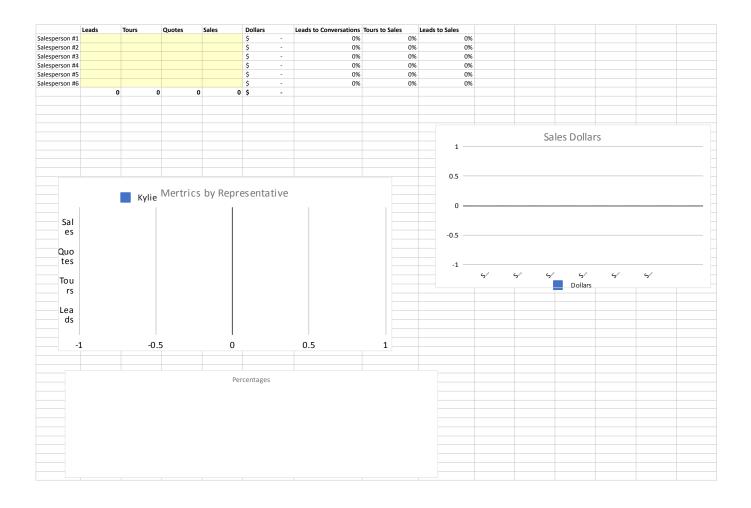
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Begin by filling out this worksheet in order to identify your career and financial goals for the upcoming year. Your Information Name John Doe Company ABC Financial Yearly Goals Beginning: January 1, 2022 Business Goals Questionnaire Entries What is the average revenue you receive per client per transaction? How many weeks of vacation would you like to take? How many days each week do you want to work? South of your leads/contacts do you convert to a presentation appointment? What is your desired annual income? Select percentage) Your Information John Doe Entries Salabact in ABC Financial January 1, 2022			
IDENTIFYING AND MONITORING YOUR BUSINES:	John Doe ABC Financial January 1, 2022 Entries Deer client per transaction? Ke to take? Dework? Work? So work? So become paying clients? (Select percentage) Soals Click On The "Goal Analysis" Tab Below		
Begin by filling out this worksheet in order to identify your career and financial	ial goals for the upcoming	year.	
Your Information			
Name	John I	Doe	
Pour Information Name John Doe Company ABC Financial Yearly Goals Beginning: Business Goals Questionnaire What is the average revenue you receive per client per transaction? How many weeks of vacation would you like to take? How many days each week do you want to work? How many hours each day do you want to work? What 'of your leads/contacts do you convert to a presentation appointment? What 's your desired annual income? To See A Breakdown Analysis of Your Goals Click On The "Goal Analysis" Tab Below			
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? How many weeks of vacation would you like to take? How many days each week do you want to work? How many hours each day do you want to work? What % of your leads/contacts do you convert to a presentation appointment? What is your desired annual income? To See A Breakdown Analysis of Your Goals Click On The "Goal Analysis" Tab Below			
Business Goals Questionnaire		Entries	
What is the average revenue you receive per client per transaction?		\$4,500	
How many weeks of vacation would you like to take?		5	
How many days each week do you want to work?		5	
How many hours each day do you want to work?		6	
What % of your leads/contacts do you convert to a presentation appointment?	(Select percentage)	20%	
What % of your presentation appointments become paying clients?	(Select percentage)	95%	
What is your desired annual income?		\$250,000	
To See A Breakdown Analysis of Your Goals Click On The "Goal Analysis" Tab Below	v		
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Name: Company:	John Doe 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 Goa	als
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 G	oals
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 Yo	our Goals
	58
Needed per Year	
Needed per Year Needed per Month	4.9
	4.9 1.2

Name:					John Doe										
Company Name:					ABC Financial										
Yearly Goals Beginning:					1/1/2022										
# of New Paying Clients Neede	d Per Month					4.63									
Average Monthly Income Goal						\$20,833									
	•														
Annual Income Goal:							\$250,000								
To achieve my career and finar	ncial goals, I ha	ve committed	to the followi	ng:											
Work	5	Day(s) per we	eek												
Work	6	Hour(s) per d	ay												
Take	5	Week(s) Vaca	ation Per Year												
Average annual revenue:	\$4,500	Per Client													
<u> </u>															
				oal Tracking F											
Week 1	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actua						
Leads/Contacts								6.2	0						
Presentation Appointments								1.2	0						
New Paying Clients								1.2	0						
Week 2	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actua						
Leads/Contacts								6.2	0						
Presentation Appointments								1.2	0						
New Paying Clients								1.2	0						
Week 3	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actua						
Leads/Contacts	mon	ruoo	Wod	Titalo		Out	Jun	6.2	0						
Presentation Appointments								1.2	Ö						
New Paying Clients								1.2	0						
Week 4	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actua						
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Presentation Appointments								1.2	0						
New Paying Clients								1.2	0						
ton r dying onemo								1.5							
Week 5	Mon	Tues	Wed	Thurs	Fri	Sat	Sun	Goal	Actua						
Leads/Contacts								6.2	0						
Presentation Appointments								1.2	0						
New Paying Clients								1.2	0						
MONTHLY SALES TOTAL								4.63	0						

P & L Breakdown	Jan		Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	P & L Breakdown
verage 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	\$300,00	Average Sale Amount
lumber of sales per month		10	10	10	10	10	10	10	10	10	10	10	10	12	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	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	Average revenue per sale
ross 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	Gross Sales Revenue
Iverhead (from below)	\$	11,550		\$ 11,550	\$ 11,550							\$ 11,550			Overhead (from below)
verage Sales Commission %		70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	Average Sales Commission %
verage 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	Average Sales Commission Total
ross profit	\$	450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 450	\$ 5,400	Gross profit
rofit percentage		1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	15	Profit percentage
ffice Expenses															Office Expenses
taff (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	Staff (benefits included)
ssistant / Receptionist (benefits included)	s	2.000	\$ 2,000	S 2.000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	S 2.000	\$ 2,000	S 2.000	\$ 2,000	\$ 2,000	\$ 24,000	Assistant (benefits included)/Receptionist
isc. Expenses	\$	500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 6,000	Misc. Expenses
ent	\$	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	Rent
tilities	s	250	\$ 250	S 250	S 250		\$ 250	S 250	S 250	S 250	S 250	\$ 250			Utilities
hone	\$	600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 600	\$ 7,200	Phone
dvertising, Marketing	s	1.000	\$ 1.000	S 1.000	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,000	S 1.000	\$ 1,000	S 1.000	\$ 1,000	\$ 1,000	S 12,000	Advertising, Marketing
egal	s	100	\$ 100	S 100	S 100	\$ 100	S 100	S 100	S 100	S 100	S 100	S 100	S 100	S 1,200	Legal
onferences	s	200	\$ 200	S 200	S 200	\$ 200		S 200	\$ 200	\$ 2,400	Conferences				
eases, equipment, software, etc.	\$	250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 3,000	Leases, equipment, software, etc.
ffice supplies	\$	150	\$ 150	\$ 150				\$ 150	\$ 150	\$ 150	\$ 150	\$ 150			Office supplies
isc. (postage, subscriptions)	s	200	\$ 200	\$ 200	\$ 200			S 200	\$ 200		Misc. (postage, subscriptions)				
ech Support	\$	500	\$ 500	\$ 500	\$ 500	\$ 500	\$ 500		\$ 500			\$ 500	\$ 500	\$ 6,000	Tech Support
raining, Recruiting, etc.	\$	300	\$ 300	\$ 300	\$ 300				\$ 300	\$ 300	\$ 300	\$ 300			Training, Recruiting, etc.
rand Total of Expenses	s	11.550	\$ 11.550	S 11.550	\$ 11,550	\$ 11,550	\$ 11,550			\$ 11,550	S 11.550	\$ 11,550			Grand Total of Expenses



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Leads to Conversations % Conversations 1000	Salesperson #3	January	February	March	April	Mav	June	July	August	September	October	November	December	2024 Total
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Leads Conversations Quotes Sales Sales Soles														
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Conversations to Sales %		0%	0%		0%	09	6	09	%	0%	0)%	0%	0	%	0%	5	0%		0%		09
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Salesperson #6	January		February	Mar		April		May		June	July		August	September		October		ovember	Decemb		2024 1	

Salesperson #6	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
Leads													0
Conversations													0
Quotes													0
Sales													0
Leads to Conversations %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Conversations to Sales %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Leads to Sales %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sales Average	0	0	0	0	0	0	0	0	0	0	0	0	0

Salesperson #7	January	February	March	April	May	June	July	August	September	October	November	December	2024 Total
•							_	_	-				
Leads													(
Conversations													
Quotes													(
Sales													
Leads to Conversations %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	09
Conversations to Sales %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	09
Leads to Sales %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	09
Dollars	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Sales Average	0	0	0	0	0	0	0	0	0	0	0	0	0

	54	LESPERSO	ON #1				- 1	SALESPER	SON#2					SALESPE	RSON#3				SAL	ESPERSPN #4					SALESPERSON #5				SALESPE	RSON #6			SALES	SPERSON #7			2024	MONTHLY	/	
eek Ending	Leads	Tours 1	Quotes St	ales Dolla	acs	Week Ending	Leads	Tours	Quotes	Sales	Dollars	Week Er	nding Lea	ds Tours	Quotes	Sales	Dollars	Week Ending L	eads 7	fours Quot	s Sales	Dollars	Week Ending	Leads	Tours Quot	ns Sales	Dollars	Leads	Tours Quo	tes Sales	Dollars	Leads	Tours 1	Quotes Sale	s Dollars	Leads	Tours 1	Quotes	Sales	Dollars
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5/2/2031		-	_		_	5(5(30))		-	_	_	-	- 2	12/2006	_	_			3/35/00	_	-	_	-	19,981	_	-	_	-	20000	-	_	-	200,000	-	_		200000	- 1		- 31	_
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						1/14/2004						- 20	56/3006		_			2/54/2026					3/56/3335					2/14/202				3/56/3000				2/54/2024	- 4		- 47	
3/31/2020						1/393004 91/3004						35	31/3000					5/53/5036					707000					2(21/202				2/07/0006				5/20/3036	9		- 61	1
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975/2024	\rightarrow	-	_		_	1/1/2024	_	-	-	-	-	- N			-	_	-	2,00,0000	_	-		-	3/2/202	-			-	10000			_	44,000	-			55000			-	-
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						10/16/2004						- 22	14/3004					10/14/2016					2/2/02					20/16/202				20/20/2020				15,54,5034	-			1
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474 2020		_	_	_	_	5,6300		_	_	_	_		- Company	_	_	_		7/2/2020	_	_	_	_	fuforsi	_		_		1/6303		_	_	-VL0021	_	_		2/4/2001			_	_
		_	_		_						_	_		_	-				_	_	_		_							_	_					2420133		-	0.5	

	Life and Business Planning	
Done?	Items to do	Due By
	Schedule a day in your time management system to Create or Refine Your Life and Business Plan	
	2. Complete the Life Plan tab and clarify your personal goals and dreams.	
	3. Create an Action Plan and Due Dates for each of the goals and action steps you establish inside both your life and business plan	
	4. Complete Your Business Plan and Financial Scorecard to focus on what matters most	
	5. Create a 12 Month Pro-Forma: 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.	
	6. Re-take this assessment in 90 days and see if you've improved in the Life & Business Plan category	
	7. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	
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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? 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.)? 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 WEAKNESSES
OPPORTUNITIES THREATS
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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	In this section id	lentify you marketing targ	ets, how you will	reach them, how often and	how much your marketing	will cost.		
ARGET #1				TARGET #5				Marketing Phase
hase	Activities	Frequency	Cost	Phase	Activities	Frequency	Cost	Lead Generation
ead Generation	Post Card	,		Lead Generation				In Process
ead Generation				Lead Generation				Client Retention
ead Generation				Lead Generation				
ead Generation				In Process				
ead Generation				In Process				
ead Generation				In Process				
lient Retention				Client Retention				
lient Retention				Client Retention				
lient Retention				Client Retention				
		Total	\$0			Total	\$0	
ARGET #2				TARGET #6				Your Frequency
hase	Activities	Frequency	Cost	Phase	Activities	Frequency	Cost	Daily
ead Generation				Lead Generation				Weekly
ead Generation				Lead Generation				Bi-Monthly
ead Generation				Lead Generation				Monthly
Process				In Process				Every Other Mon
Process Process				In Process				Quarterly
lient Retention				In Process Client Retention				Semi-Annually
lient Retention				Client Retention				Annually
lient Retention				Client Retention				
Ment retention		Total	\$0	Cheft Retention		Total	\$0	
ARGET #3		Total	Ψ0	TARGET #7		Total	w v	Varia Antivities
hase	Activities	Frequency	Cost	Phase	Activities	Frequency	Cost	Your Activities Direct Mail
ead Generation	71011711100	Troquency		Lead Generation	71011711100	1 Toquolity		Post Card
ead Generation				Lead Generation				Newsletter
ead Generation				Lead Generation				Email
Process				In Process				Newspaper Ad
Process				In Process				Seminar
Process				In Process				Tele-Marketing
lient Retention				Client Retention				Call Capture
lient Retention				Client Retention				Blog
lient Retention				Client Retention				Podcast
		Total	\$0			Total	\$0	Internet Leads
ARGET #4				TARGET #8 - OTHER				Radio/TV Ads
hase	Activities	Frequency	Cost	Phase	Activities	Frequency	Cost	Internet Ads
ead Generation	Addividos	ricquency	0031	Lead Generation	Activities	1 requestey	0031	Special Event
ead Generation				Lead Generation				Lunch Meeting
ad Generation				Lead Generation				Associations
Process				In Process				Chamber
Process				In Process				
Process				In Process				
ient Retention				Client Retention				
lient Retention				Client Retention				
land Data attan				Client Retention				
ient Retention		Total	\$0			Total	\$0	

MARKET <u>ING</u>	G CALENDAR							
	Iden	itify and schedule	the release o	f vour marketing	materials.			
ANUARY		,		JULY				
ction	Notes	Due	Done	Action	Notes	Due	Done	LIST OF "ACTIONS Direct Mail
ewsletter	Notes		Dolle	ACTION	Notes	1st	Dolle	Post Card
ost Card		1st 6th				6th		Newsletter
rect Mail		9th				9th		Email
eminar		12th 15th				12th 15th		Newspaper Ad Seminar
le-Marketing						15th 18th		Tele-Marketing
ternet Leads adio/TV Ads		18th				21st		Call Cantura
pecial Event		21st 24th				21st 24th		Call Capture
								Blog Podcast
pg		27th				27th		
BRUARY				AUGUST				Internet Leads Radio/TV Ads
tion	Notes	Due	Done	Action	Notes	Due	Done	Internet Ads
Juon	Hotes	1st	Done	Action	Notes	1st	Done	Special Event
		6th				6th		(insert activity)
		9th				9th		(insert activity)
		12th				12th		(insert activity)
		15th				15th		(insert activity)
		18th				18th		(macri activity)
		21st				21st		Due Dates
		24th				24th		1st
		27th				27th		2nd
		270.				2701		3rd
ARCH				SEPTEMBER				4th
ction	Notes	Due	Done	Action	Notes	Due	Done	5th
		1st				1st		6th
		6th				6th		7th
		9th				9th		8th
		12th				12th		9th
		15th				15th		10th
		18th				18th		11th
		21st				21st		12th
		24th				24th		13th
		27th				27th		14th
								15th
PRIL				OCTOBER				16th
ction	Notes	Due	Done	Action	Notes	Due	Done	17th
		1st				1st		18th
		6th				6th		19th
		9th				9th		20th
		12th				12th		21st
		15th				15th		22nd
		18th				18th		23rd
		21st				21st		24th
		24th				24th		25th
		27th				27th		26th
								27th
AY				NOVEMBER				28th
ction	Notes	Due	Done	Action	Notes	Due	Done	29th
		1st				1st		30th
		6th				6th		31st
		9th				9th		
		12th				12th		
		15th				15th		
		18th				18th		
		21st				21st		
		24th				24th		
		27th				27th		
JNE				DECEMBER				
tion	Notes	Due	Done	Action	Notes	Due	Done	
		1st				1st		
		6th				6th		
		9th				9th		
		12th				12th		
		15th				15th		
		18th				18th		
		21st				21st		
		24th				24th		
		27th		4		27th		

Month:	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec		
urce:											,		Totals	%
Past Clients	1												1	50%
Friends	1												1	509
Relatives													0	0%
Website													0	0%
Email Marketing													0	0%
Seminars													0	09
Direct Mail													0	09
Chamber													0	09
Articles													0	0%
Corporate Marketing													0	09
Associations													0	09
Other:													0	09
Other:													0	09
Other:													0	09
Other:													0	0%
Other:													0	09
Other:													0	09
Other:													0	0%

	Marketing Strategies	
Done?	Items to do	Due By
	Schedule time into your time management system to improve your marketing skills and strategies and to spend time each week in marketing specific activities.	
	2. Create Your Marketing Plan: 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".	
	3. Update Your Marketing Plan with Lead Generation, In-Process and Client Retention Strategies: To build a steady flow of incoming leads you should market your business during each of these phases to maximize your lead generation opportunities.	
	3a. Lead Generation: 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).	
	3b. In-Process Marketing: 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).	
	3c. Client Retention: 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.	
	4. Review and Measure Results: 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	
	5. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	
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Top Referral List		List Your T	op Re	ferral Sources In Order of F	Pric	orit	y (A, B and C)			Da	te:	
P Business Owners	Р		Р	Relatives		Р			Р	HR Managers	Р	Top Clients
					1							
											T	
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		Hot Prospects		Hot Prospects			Hot Prospects			Hot Prospects		
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Referral Partnerships										
Done?	Items to do	Due By								
	Schedule time into your time management system to improve your Referral Partnerships									
	2. Build Your Top Referral List: 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									
	3. The Approach: 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.									
	4. Presenting: 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?									
	5. Overcoming Objections: 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.									
	6. Closing Techniques: 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.									
	7. Following up: Schedule specific times during the day, week and/or month to focus on following up with your top referral sources									
	8. Visit www.GrowMyProfit.com for additional input and/or perspective									
	Other:									
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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			
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17			
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19			
20			
21			
22			
23			
24			
25			
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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			
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OSITION GROU			<u> </u>	POSITION GROU	much your training will cost.			
hase	Activities	Frequency	Cost	Phase	Activities	Frequency	Cost	Marketing Phase Orientation
Prientation	Orientation Training	Single Event	Cost	Orientation	Boot Camp	Single Event	Cost	Ongoing
rientation	Online Training	Single Event		Orientation	Conference Calls	Single Event		Advanced
ngoing	Weekly Meetings	Weekly		Ongoing	Company Website	Weekly		Auvanceu
ngoing	Mentoring	Weekly		Ongoing	One on One	Weekly		
ngoing	Wentoning	vvcckiy		Ongoing	One on one	vveekiy		Your Frequency
ngoing				Ongoing				Single Event
dvanced				Advanced				Daily
dvanced				Advanced				Weekly
dvanced				Advanced				Bi-Monthly
avancea		Total	\$0	Advanced		Total	\$0	Monthly
OSITION GROU	JP #3	rotai	ų,	POSITION GROU	JP #4	Total	Ų.	Every Other Mont
hase	Activities	Frequency	Cost	Phase	Activities	Frequency	Cost	Quarterly
rientation	Orientation Training	Single Event		Orientation	Orientation Training	Single Event		Semi-Annually
rientation	Online Training	Single Event		Orientation	Online Training	Single Event		Annually
ngoing	Weekly Meetings	Weekly		Ongoing	Weekly Meetings	Weekly		
ngoing	Mentoring	Weekly		Ongoing	Mentoring	Weekly		
ngoing		,		Ongoing		,		Your Activities
ngoing				Ongoing				Boot Camp
dvanced				Advanced				Conference Calls
dvanced				Advanced				Company Website
dvanced				Advanced				Mentoring
		Total	\$0			Total	\$0	One on One
								Online Training
otal Trainii	ng Budget =	\$0			Copyright 2024 GrowMyProfit.com	n. All Rights Reserved.		Orientation Training
								Podcasts
								Sales Conference
								Self Study
								Shadowing
								1-Day Seminar
								2-Day Seminar
								3-Day Seminar
								Special Event
								Webinar

		Identify and schedule your	training pr	ograms for the uncomin	ng year		
JANUARY		identify and seriedate your	training pro	JULY	ig year.		_
Topic	Notes	Date	Done	Topic	Notes	Date	Done
FEBRUARY				AUGUST			
Горіс	Notes	Date	Done	Topic	Notes	Date	Done
							+
MARCH				SEPTEMBER			
Topic	Notes	Date	Done	Topic	Notes	Date	Done
APRIL				OCTOBER			
Topic	Notes	Date	Done	Topic	Notes	Date	Done
							+
MAY				NOVEMBER			
Topic	Notes	Date	Done	Topic	Notes	Date	Done
JUNE				DECEMBER			
Topic	Notes	Date	Done	Topic	Notes	Date	Done

	Sales Plan	
Done?	Items to do	Due By
	Schedule time into your time management system to improve your sales skills to improve your prospect to closing conversion ratios and begin increasing your income today!	
	2. Prospecting: Develop a standard profile of your ideal client/customer to help you clearly focus on who you should be prospecting.	
	3. The Approach: 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.	
	4. Presenting: 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?	
	5. Overcoming Objections: 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.	
	6. Closing Techniques: 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.	
	7. Following up: Schedule specific times during the day, week and/or month to focus on following up with your top referral sources	
	8. Following up: Schedule specific times during the day, week and/or month to focus on following up with past prospects and associated leads	
	9. Customer Service: Create your own "Customer Service Checklist" on the key contact points where you can create Raving Fans	
	10. Time Management: 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	
	11. Visit www.GrowMyProfit.com for additional input and/or perspective	
	Other:	
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	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			
	Schedule time into your time management system to improve your leadership skills today!				
	2. Habits – Clarify the leadership habits you want to see throughout your organization				
	3. Priority Management – Create time blocks for your highest leadership priorities and organize your calendar to match your goals and what matters most to you.				
	4. Peak Performance Culture – Define your cultural standards and the environment you wish to create.				
	Organizational Chart – Create an organization chart with clear communication path and defined job descriptions.				
	6. Common Leadership Issues – 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.				
	7. Visit www.GrowMyProfit.com for additional input and/or perspective				
	Other:				
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Operations Plan				
Done?	Items to do	Due By		
	Schedule time into your time management system to improve your operational systems and increase your efficiency and effectiveness today!			
	2. Technology : 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.			
	3. Process Flow: 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			
	4. Client Retention Checklist: 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!			
	5. Team Members Resources: 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.			
	6. Workspace Organization: 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.			
	7. Visit www.GrowMyProfit.com for additional input and/or perspective			
	Other:			
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