

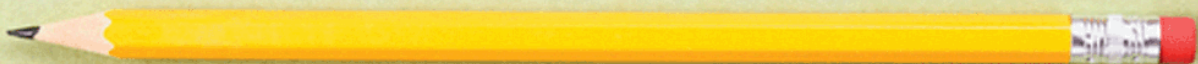
-WORKBOOK-



START AT



THE END



DAVE LAVINSKY

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CHAPTER #1: The End of Your Business

A. Write down your customer-focused vision statement

B. Write down your business-focused vision statement

On _____ (date), I will _____ (type of exit) resulting in _____ (\$ amount).

C. Define your financial metrics vision at exit

Revenues: _____

EBITDA: _____

Market Share: _____

Other: _____

D. Define your business assets vision at exit

Customers/marquee customers: _____

Products: _____

Services: _____

Technology/Intellectual property: _____

Distribution network: _____

Location(s): _____

Reputation/Brand (trademarks/copyrights): _____

Team/employee talent: _____

Financial & Operational Systems/processes: _____

Strategic partnerships: _____

Other: _____

CHAPTER #2: Confirming the Opportunity

A. Write down and rank your strengths

B. Write down your top opportunities for growth

C. Write down how your growth opportunities rank against:

1) Your Strengths

2) The Ansoff Matrix

3) Market Criteria

4) Financial Projections

D. Write down, in order of importance, your top 1-3 opportunities to grow your business

CHAPTER #3: Goals & Milestones

A. Write down/confirm exit vision

On _____ (date), I will _____ (type of exit) resulting in _____ (\$ amount).

B. Define Your Financial Metrics Vision for this Year

Revenues: _____

Revenue Growth: _____

EBITDA: _____

Market Share: _____

Other: _____

C. Define Your Business Assets Vision for this Year

Customers/marquee customers: _____

Products: _____

Services: _____

Technology/Intellectual property: _____

Distribution network: _____

Location(s): _____

Reputation/Brand (trademarks/copyrights): _____

Team/employee talent: _____

Financial & Operational Systems/processes: _____

Strategic partnerships: _____

Other: _____

D. Define Your Financial Metrics Vision for this Quarter

Revenues: _____

Revenue Growth: _____

EBITDA: _____

Market Share: _____

Other: _____

E. Define Your Business Assets Vision for this Quarter

Customers/marquee customers: _____

Products: _____

Services: _____

Technology/Intellectual property: _____

Distribution network: _____

Location(s): _____

Reputation/Brand (trademarks/copyrights): _____

Team/employee talent: _____

Financial & Operational Systems/processes: _____

Strategic partnerships: _____

Other: _____

F. Define Your Financial Metrics Vision for this Month

Revenues: _____

Revenue Growth: _____

EBITDA: _____

Market Share: _____

Other: _____

G. Define Your Business Assets Vision for this Month

Customers/marquee customers: _____

Products: _____

Services: _____

Technology/Intellectual property: _____

Distribution network: _____

Location(s): _____

Reputation/Brand (trademarks/copyrights): _____

Team/employee talent: _____

Financial & Operational Systems/processes: _____

Strategic partnerships: _____

Other: _____

CHAPTER #4: Achieving Your Financial Metric Goals

A. In the chart below, identify the KPIs you will track, how often you will track them, and against what you will judge your performance

<u>Key Performance Indicators (KPIs)</u>	<u>Frequency</u>	<u>Versus</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

B. Define how you will maintain your financial dashboard

1. What program will you use to maintain your dashboard, for example, Microsoft Excel? Google Doc? Etc.?

2. Who will manage it?

3. Who will be responsible for adding what data?

CHAPTER #5: Achieving Your Business Asset Goals

A. Complete your big picture Gantt chart to include ALL of the key business assets you want to build in next 12 months

Business Asset	Person Responsible	Status	Month											
			1	2	3	4	5	6	7	8	9	10	11	12

B. Complete project Gantt charts for your two most important projects

Project: _____														
Project Manager: _____														
			Month											
Task/ Activity	Person Responsible	Status	1	2	3	4	5	6	7	8	9	10	11	12

Project: _____														
Project Manager: _____														
			Month											
Task/ Activity	Person Responsible	Status	1	2	3	4	5	6	7	8	9	10	11	12

CHAPTER #7: How to Out-Market Your Market

A. Create your detailed customer profile

1. What needs, wants, or desires does your offering satisfy, or what problems does your product or service solve? (E.g., cleanliness, exclusivity, results, safety, timeliness, convenience, atmosphere)

2. How much do your products or services cost? (E.g., are you going after the mass market? Do you offer a luxury good?)

3. Who is the customer decision maker who chooses whether to buy your products or services? Is there also a customer influencer? (E.g., kids influencing mom to buy a toy)

4. How do customers purchase your products? (E.g., website, retail store—in which case the target customer will need to live within a certain geographic area—etc.)

5. Where do your customers live or work? _____

6. How old are they? _____

7. What is their income? _____

8. What gender(s) are they? _____

9. What nationality or ethnicity are they? _____

10. What is their average household size? _____

11. In what occupations do they work? _____

12. What language(s) do they speak? _____

If you are serving business customers:

13. What is their company revenue? _____

14. What industry are they in? _____

15. What is their job function or title? _____

16. To whom do they report? _____

17. What activities do your customers enjoy? _____

18. What interests do they have? _____

19. What are their strongest opinions? _____

20. What attitudes do they have? _____

21. What do they believe in? _____

22. What are their core values? _____

B. Lead Generation Sources

1. Mark which lead generation sources you are currently using and which ones might prove profitable in the future. [Make sure you include testing these new sources in your annual plan]

Direct Mail _____

Print Ads _____

Radio and TV Ads _____

Networking _____

Telemarketing _____

Event Marketing _____

Email and Print Newsletter Marketing _____

Press Releases/PR _____

Search Engine Optimization/Marketing _____

Social Media Marketing _____

Partnerships _____

CHAPTER #8: Securing & Locking Up Your Customers

A. Create Your Unique Selling Proposition (USP)

1. Write down key values and/or benefits your customers receive

2. Write how customers feel after consuming

3. Document how your company is unique

4. Write how you'd like customers to perceive your business

5. Combine your answers

6. Condense your long USP summary into just one line

B. Improve your offers

1. Mark which offers you will try and the details of each

Free Offers & Free Trials _____

Guarantee Offers _____

Packaged Offers _____

Discount Offers _____

Premium Offers _____

C. Write down sales scripts that you can create or improve

D. Write down how you can increase your social proof

E. Write down what you will do to nurture your prospects

F. Write down how you will improve prospective customers' perceptions of you.

G. Optimizing your transaction prices

1. Mark which ways you will use to optimize transaction prices and the details of each

Raising Prices _____

Offering Product or Service Packages _____

Up-Selling and Cross-Selling _____

Increasing the Order Size _____

H. Optimizing lifetime customer value

1. Mark which ways you will use to optimize lifetime customer value and the details of each

Ongoing Communications _____

Loyalty Programs _____

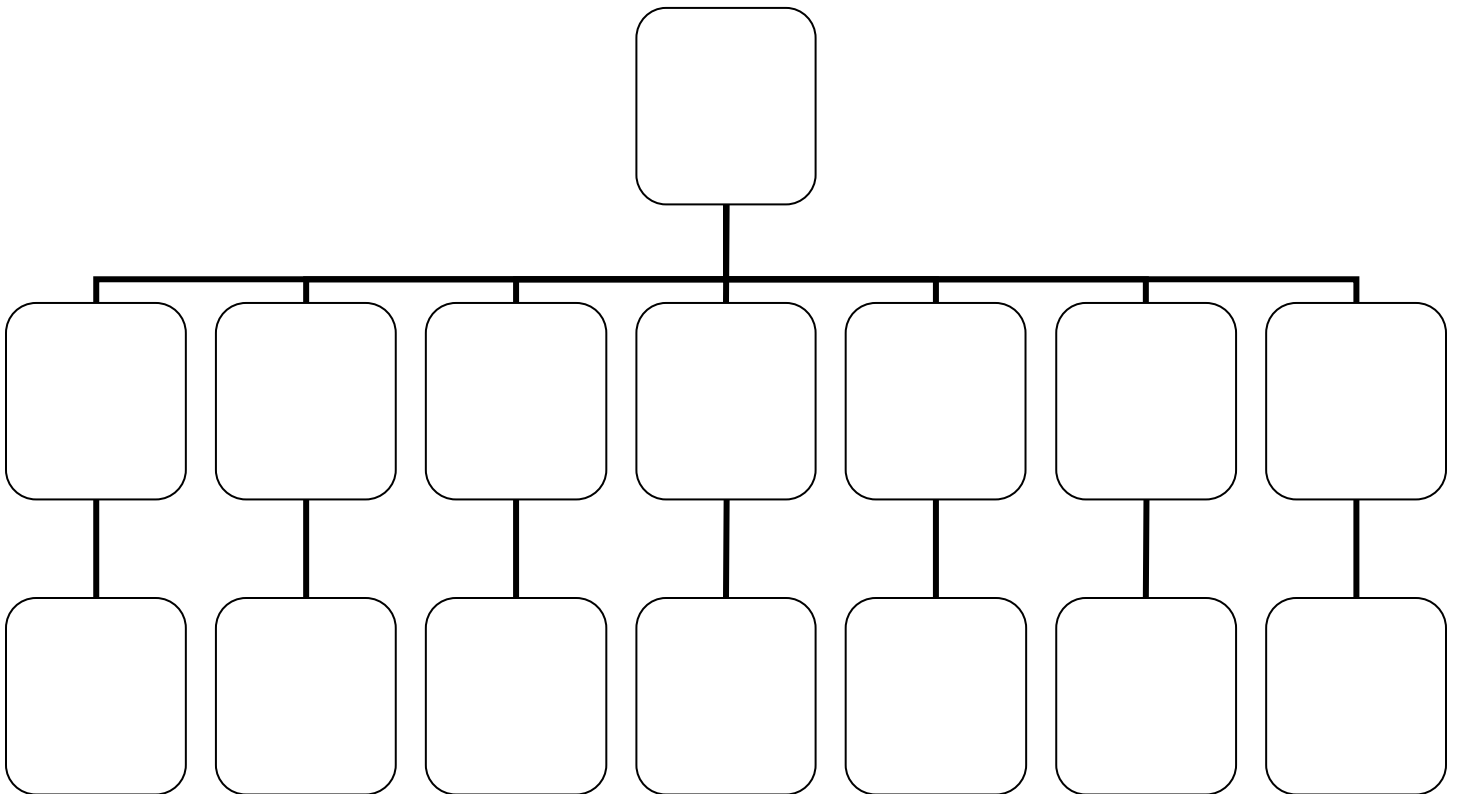
Continuity or Membership Programs _____

I. Document how you will use and/or improve your referral program

CHAPTER #9: Developing Your HR Plan

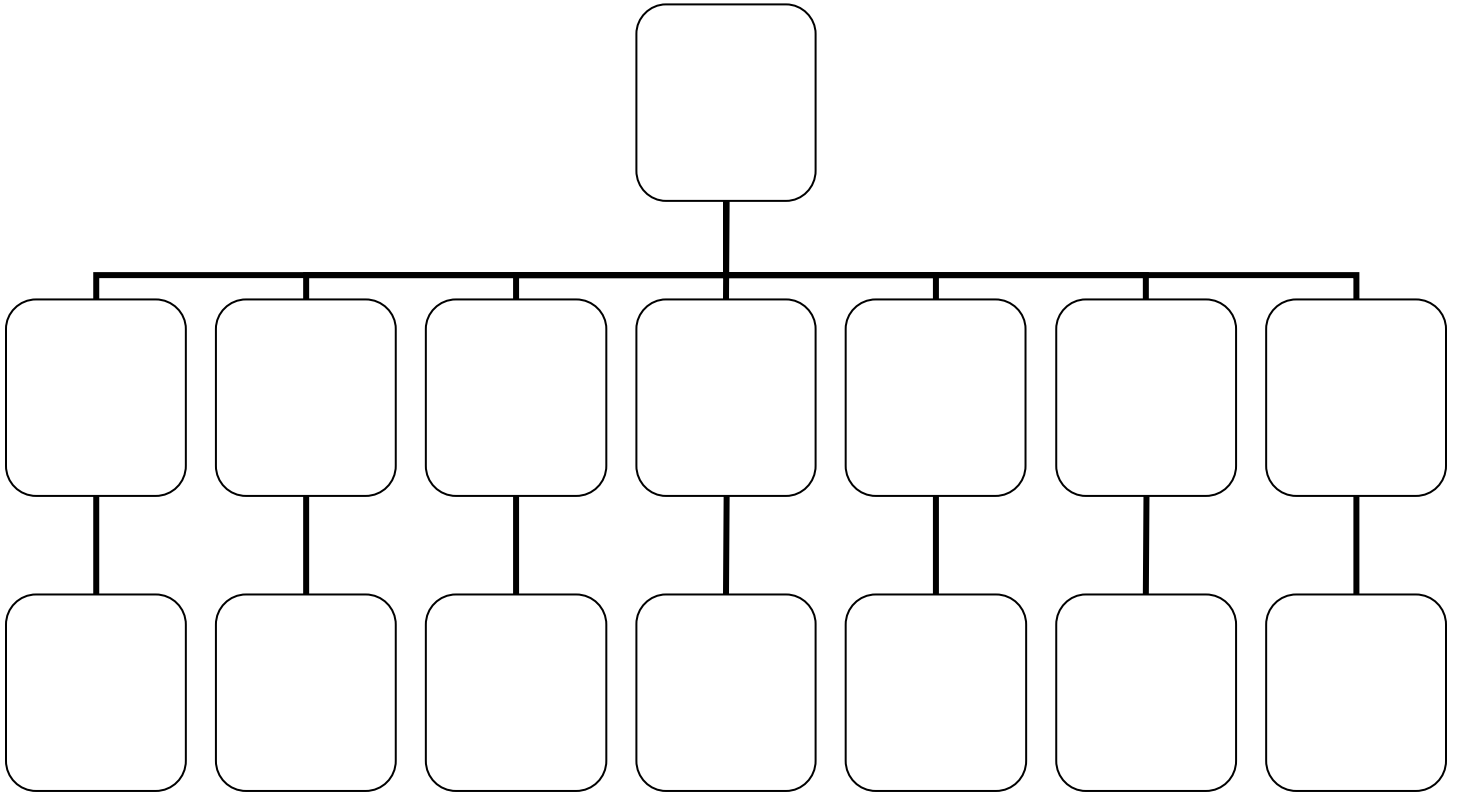
A. Complete your end-game org chart

(Add to the structure of the sample org chart below (e.g., add new boxes and/or lines) as needed).



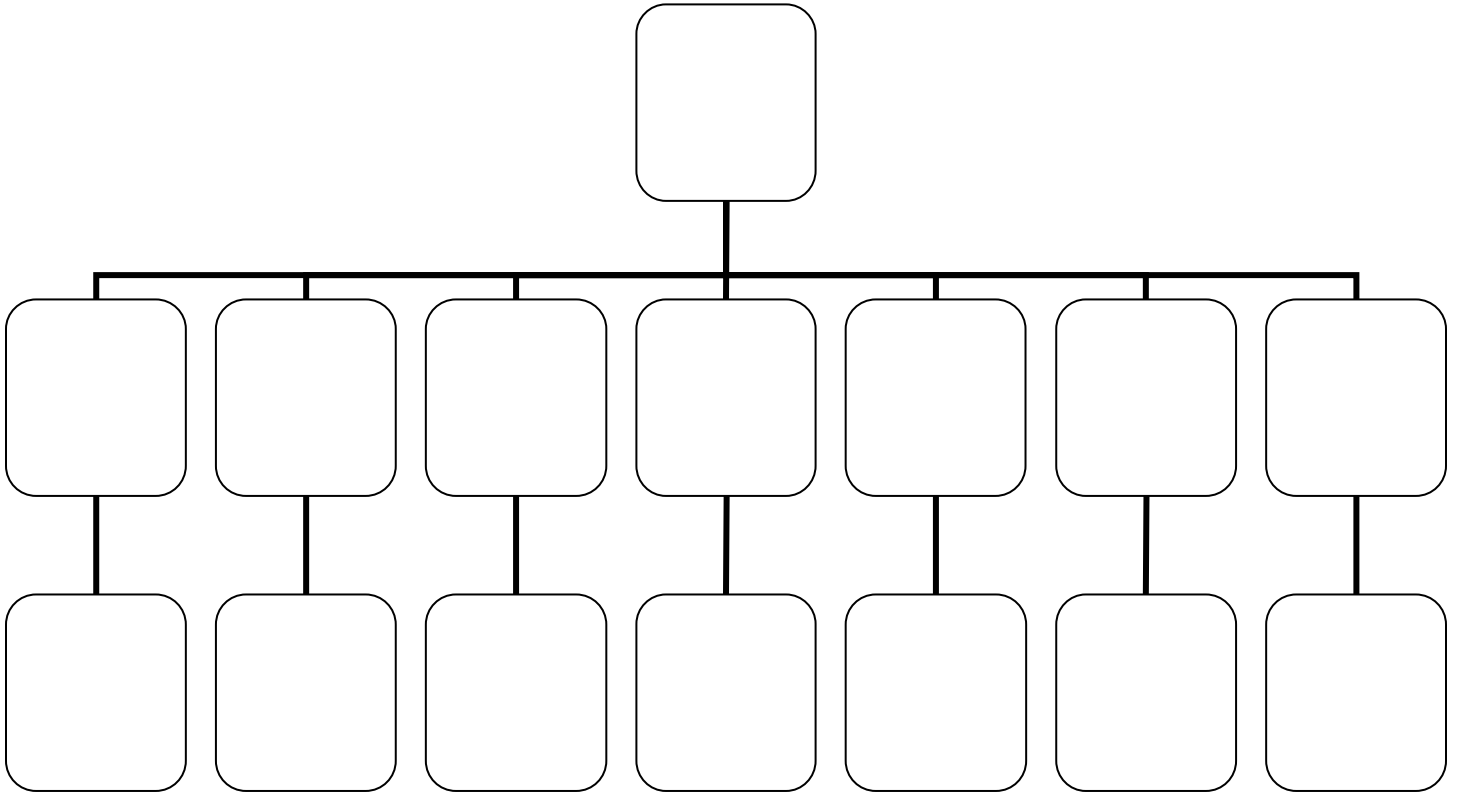
B. Complete your current org chart

(Add to the structure of the sample org chart below (e.g., add new boxes and/or lines) as needed).



C. Complete your annual org chart

(Add to the structure of the sample org chart below (e.g., add new boxes and/or lines) as needed).



CHAPTER #10: Documenting Your Strategic Plan

A. Checklist for completing your strategic plan

1. Executive Summary

- *Complete last; summarize key objectives and key parts from other sections)*

2. Company Vision Statements

- *Include your customer- and business-focused visions, and financial metrics and business assets goals*

3. Opportunities to Pursue

- *Document the opportunities you have chosen to pursue and why*

4. Goals and Milestones

- *Document your exit or five-year, one-year, quarterly, and monthly financial metric and business asset goals*

5. Financial Metrics and KPIs

- *Document the KPIs you will track in your business*

6. Business Assets

- *Document the business assets you need to develop in the coming year, and the individual projects you must complete to build them*

7. Systematization Plan

- *Detail the new systems you have prioritized for creation*

8. Marketing Plan

- *Detail your marketing plan*

9. Human Resources Plan

- *Include your three organization charts, list your current employees and their roles, identify new employees that you need to hire this year*

10. Financial Projections

- *Include your strategic plan's financial implications*

CHAPTER #11: How to Progress Even Faster

A. Identify the highest and lowest value uses of your time

1. Write down the tasks/projects you do that add the most value to your company? [Start spending more time on these tasks]

2. Write down the lowest value tasks that you do (e.g., sending faxes) that you do [Find other people to start doing them for you]

CHAPTER #12: Becoming A Better Leader

A. Checklist to ensure you continue to properly motivate your employees

Periodically review the list below to make sure you are properly motivating your employees. Include relevant notes regarding how you would like to use these motivational techniques below.

1. **Make employees feel they are doing something meaningful**

2. **Effectively communicate and share information**

3. **Give employees clear job descriptions and accountability**

4. **Give and receive ongoing performance feedback**

5. **Have—and show—faith and trust in your team**

6. Listen to, focus on, and respect your employees' needs

7. Provide recognition to worthy employees

8. Provide fair compensation and pay for the performance you seek

9. Foster innovation

10. Establish fair company policies that support the company's goals

11. Get ongoing input from employees

12. Manage, but don't micromanage

13. Encourage teamwork

14. Modify your management approach for different types of employees

15. Give employees opportunities for personal growth

16. Fire people when needed

CHAPTER #13: Multiplier Tactics

A. Identify the 5 things that worked best in your business and that worked worst in your business in the last year (and start doing more of what worked)

1. Top 5 things that worked in last 12 months

1. _____

2. _____

3. _____

4. _____

5. _____

1. Top 5 things that did NOT work well in last 12 months

1. _____

2. _____

3. _____

4. _____

5. _____

B. Develop an Advisory Board

**Identify people who would be ideal candidates for your Advisory Board
(then start contacting them)**

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

13. _____

14. _____

15. _____