



Your Business Success Plan

A simple 3-part system for getting everything you want in business.

Your Business Success Plan

Hey there!

Ready to create your Business Success Plan?

The ability to create a plan and then work to the plan is one of the most fundamental secrets to the success of any project or venture.

It doesn't mean everything always goes to plan, but I've found that **HAVING** a plan always gets me a lot closer to the outcome I want than **NOT** having a plan.

Planning gives you a clear handle on your goals and allows you to make the best use of your time, energy and resources.

If you...

- Need more clarity on your business direction
- Find yourself unfocused or overwhelmed
- Want to get a better handle on your priorities
- Are already to be more productive and create more results

... you're going to love creating your own HerBusiness Success Plan.

Follow our easy step-by-step process to create a 'plan at a glance' for your business.

Suzi Dafnis

CEO, HerBusiness





Let's get started

Creating a plan that gives you clarity and gets results begins with having a clear VISION (a vivid picture of what your desired future looks like).

My Vision for My Business

What is the long-term vision for your business? Go out as far in the future as you'd like and include as much detail as you can about how life looks when you are living your vision. Your vision is where you want to go. What does life look like when you get there?



My 12-Month Vision

What's a 12-Month Vision? Glad you asked. This is a goal that, if achieved over the next 12 months could really revolutionise your business and give you more of your ideal business. Your Big Goal can be a monetary goal, or reducing your hours each week, or introducing that new revenue stream that you've been wishing for.

Here are some examples

- Increase my income by \$50,000 in the next 12 months
- To have in excess of 100 members by 31 December
- Hire a manager so that I can step out of the day-to-day operations
- Move from working 1:1 to working 1:many
- Leave my part-time job and be working full time in my business

My 12-Month Vision (the goal that would really move the needle in my business over the next 12 months is):

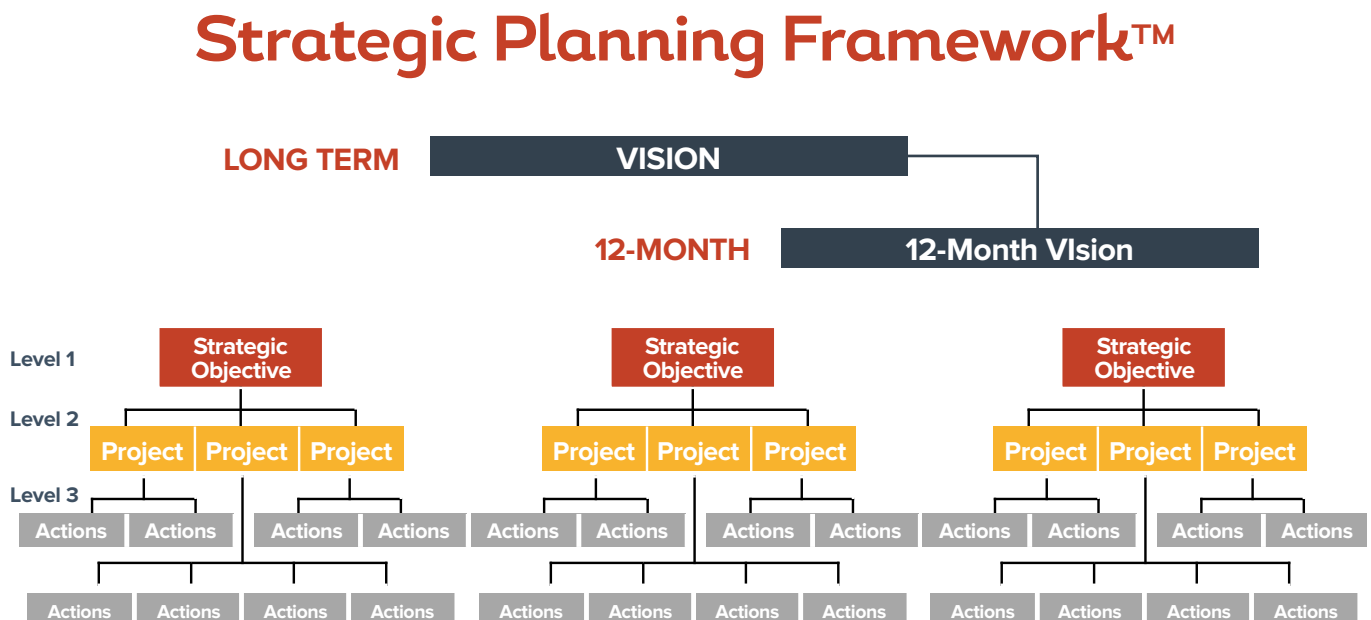
Once you have your VISION and your 12-Month Vision, you can use three levels of the HerBusiness Strategic Planning Framework to bring your 12-Month Vision into reality.

The HerBusiness Strategic Planning Framework™

The three levels of the HerBusiness Strategic Planning Framework are:

- Strategic Objectives
- Projects
- Actions

It's best to set these once you've set your VISION and your 12-Month Vision.





My Strategic Objectives

Strategic Objectives are high payoff activities that are the big-picture goals in your business. They can span many years, or a single year or shorter period of time.

Strategic objectives are often related to business performance that creates more of an ideal business and moves you close to your 12-Month Vision and long-term Vision.

Strategic Objectives don't HAVE to be specific but the more specific the better.

What they do have to be is needle-movers in your business. Strategic Objectives usually have a number of Projects associated with them.

So, for instance, if your Strategic Objective was to launch a new product, you might have a few key projects you need to undertake, including a research project to better understand your market and a design project to develop your new product and so on.

Some examples of Strategic Objectives:

- **Financial Growth:** To increase revenue by 10% annually.
- **Current Customers:** Achieve and maintain outstanding customer service.
- **New Customers:** Introduce existing products into a new market.
- **New Customers:** To expand sales to the global marketplace.
- **Technology Management:** Increase efficiencies through the use of a new CRM and Website.
- **Marketing:** Develop and implement a promotional plan to drive increased business.
- **Team Training:** To develop the leadership abilities and potential of our team.

You can, and will have more than one Strategic Objective at any time. For example, you might want to grow your database by 500 people AND bring in an extra \$150K AND grow to a team of 5, all in one 12 month period.

My Top 3 Strategic Objectives for the next 12 months are:

Projects

Dialling in our Projects and aligning them to your Strategic Objectives is THE MOST powerful way to get to your goals faster. We can waste so much time working on low-level projects that don't lead to us reaching our bigger goals.

How are Projects different from Strategic Objectives?

Projects have start dates and end dates. Projects can include a number of campaigns and smaller projects.

They have a number of actions and accountabilities related to them.

There is evidence of the completion of the project and measurable outcomes.

For example, a Project might be:

- To run a webinar.
- To have an in-store promotion
- To recruit a new team.
- To write a book.
- To launch a membership.
- To create an online course.
- To write a business plan.
- To create a new product or service.

Each item has a number (sometimes hundreds) of Actions associated with the project. All Actions are part of the whole picture and the project is not complete until all the elements are complete.

Map out your Projects on the next page, tying them back to your Strategic Objectives.

PROJECT EXAMPLE ONE

Strategic Objective

Generate 5,000 new leads this year.

Projects

Project 1: Online Summit

Project 2: Free PDF Download

Project 3: Quiz

PROJECT EXAMPLE TWO

Strategic Objective

Replace \$150K salary with high-level 1:1 consulting.

Projects

Project 1: Get 10 Speaking Engagements

Project 2: Create an email nurture sequence to nurture all new leads

Project 3: Develop two new strategic alliances

Now it's your turn.



My Strategic Objective 1

The Projects that I will complete to meet this Strategic Objective (try and limit the number of projects to 3-5)

My Strategic Objective 2

The Projects that I will complete to meet this Strategic Objective (try and limit the number of projects to 3-5)

My Strategic Objective 3

The Projects that I will complete to meet this Strategic Objective (try and limit the number of projects to 3-5)

Actions

The final part of the HerBusiness Strategic Planning Framework is the Actions that you'll take to complete each project.

Here is where you get VERY specific about who is doing what - and when.

When we start to list out the actions, we get to see the real magnitude of any project.

We also get to see if we need to outsource tasks that are outside of our ability or capacity or desire to complete.

Go nuts. List as many Actions as you like for each project, but keep it to what really matters. The first time you complete a project - whether it's a new webinar, a sales page, a systems manual, branding guidelines etc. build out the project to the best of your ability.

Each time you repeat a project there will be nuances that you'll have from your experience.

You can also add bells and whistles that were too much for you to manage the first time around.

We've found that for sure. Each time we run an event for a second or third time, we can play with new marketing channels, plug-ins, ad types etc. But the first time we did the bare bones of a project and the actions reflected that bare-bones approach. The goal is to complete the project. Not to get it perfect.

Note: The biggest reason that many business owners do NOT reach their big goals is that they start with Actions. Actions should be determined ONLY after you're clear on what your most important 'needle-moving' projects are. And, remember, these projects are determined by your Strategic Objectives, which are determined by your Vision and 12-Month Vision.

Mapping Out Your Actions

This is where you map out the various Actions needed to complete in project.

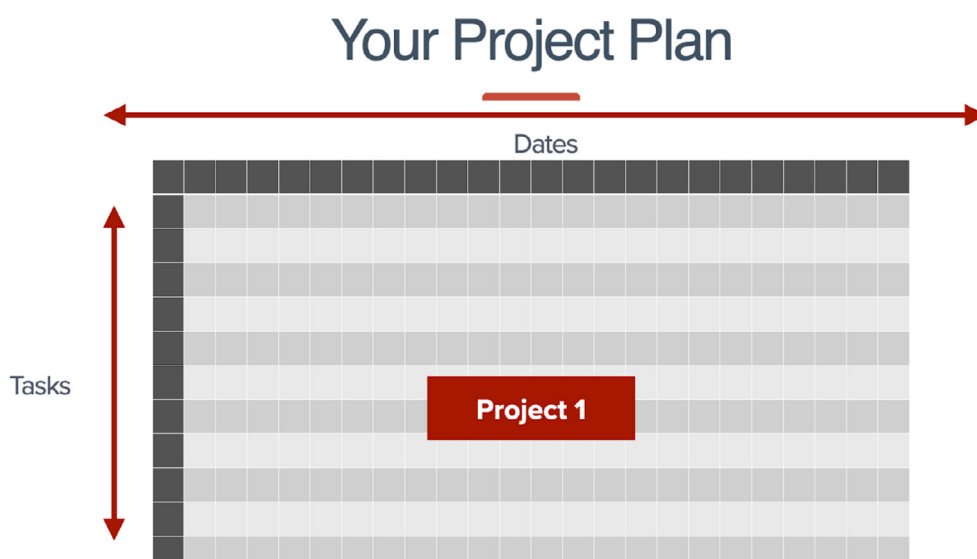
Here is where you get very specific about who is doing what, when.

You are assigning dates, milestones, responsibilities.

You are getting into the nitty gritty.

Here tools like Asana, TeamworkPM or Monday can really help.

But, if you don't have access to a spreadsheet, you can start by creating a simple spreadsheet like the one shown here below.





We call this a Project Plan.

Project plans can help you identify:

- Length of time actions will take
- The order that actions need to occur in
- What gaps in knowledge / know-how
- What can be outsourced / leveraged
- What's achievable in any given period

You can also create a project plan in a simpler way using Post It Notes, or a Trello Board, or a bulleted list on Google docs or a flow chart.

Regardless, write out every task and cluster them in categories and then put them in date order.

For example, if one project is a webinar you might have tasks related to these categories:

- Marketing (which may include email, website, paid and free promotion of your webinar)
- Administration (setting up your emails, tagging, CRM etc.)
- Presentation (the keynotes slides and notes and the running of your webinar including all the technologies)
- Post event (all the cleanup that needs to happen AFTER an event including any follow up with prospects and clients.)

The key is to know exactly what every project involves so that you can check:

What amount of time should I allocate?

What resources (people, systems, tech) will I need?

Are there gaps in my knowledge that I need to fill by doing a course?

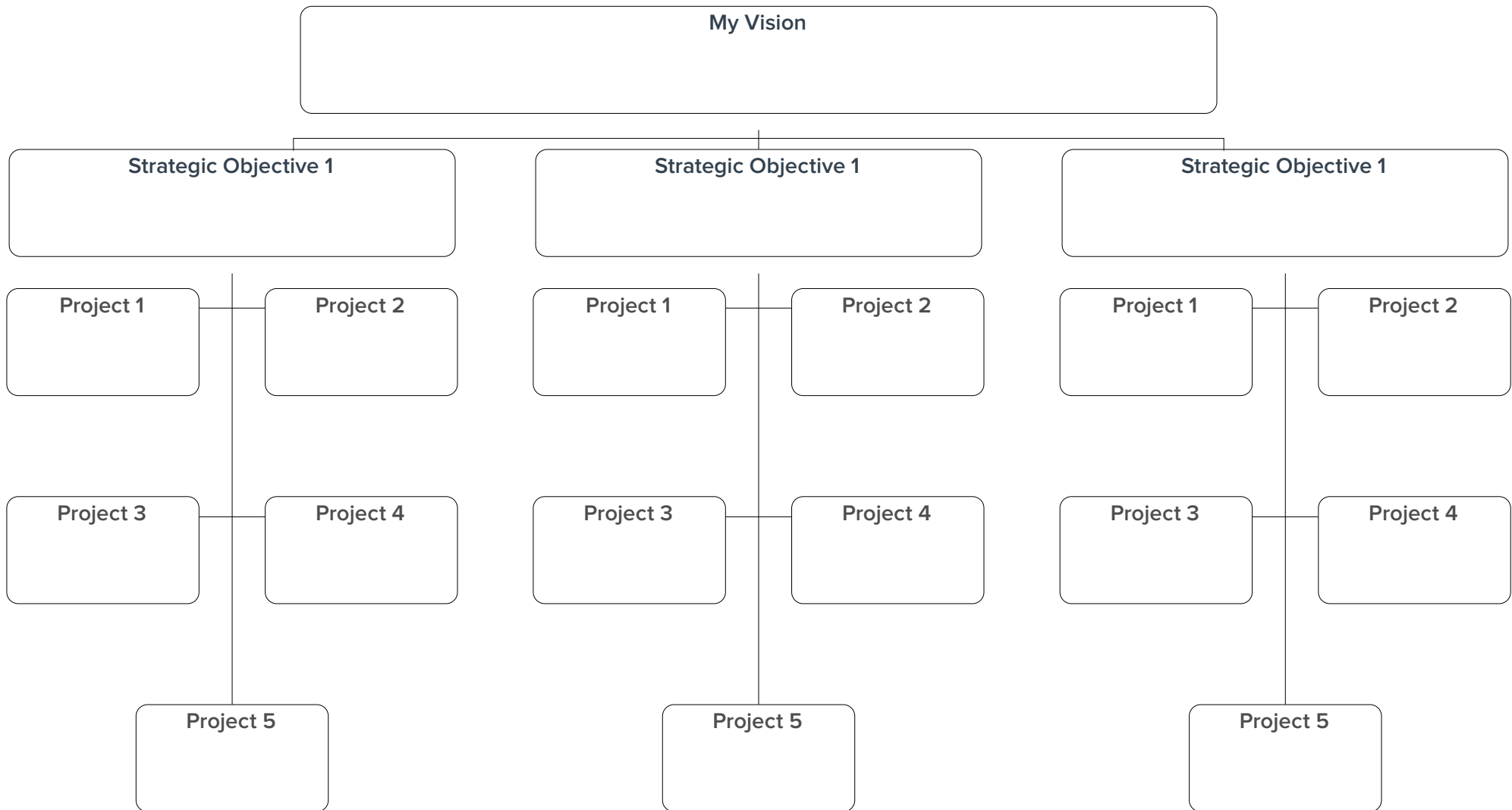
The key is to get started.

From the top (your vision) down (to your actions).

Good luck.

Here's to doing what you love, every day.

Suzi Dafnis



Completing Your 1- Page Strategic Plan

Complete this 1-page plan by adding your own plan details.

- **Vision** - Summarise your 12-month vision.
- **Strategic Objectives** - Remember to keep your strategic objectives for any 12-month period to 1 - 3 objectives.
- **Projects** - For every objective create 1- 5 projects. Leave any boxes that do not apply, empty.
- **Actions** - Build your actions out using on of the action tips on Page 9 to create your Project Plan.

Share this Plan with your team and post it somewhere prominent so that you have easy access to it and can be reminded of your highest priorities.

