



Planning Day Guidelines

Congratulations on taking the time to plan. Even if things don't go to plan, having a plan is better than no plan and allows you to be more in control of your business.

Your Planning Day

There are many ways to plan. These guidelines are suggestions based on some of the things we've seen work time and time again. They are there to guide you and there are no hard-and-fast rules.

In this guidelines document you'll find:

- Planning Day Schedule
- Planning to Plan
- Four Parts to Your Plan
 1. Personal
 2. Business Activity
 3. Marketing
 4. Financials
- Planning Day Worksheet
- Next Steps

Good luck and happy planning.

A handwritten signature in black ink, appearing to read "Suzi".

Suzi



Planning Day Schedule

To get started with your plan I recommend that you choose a day, free from distractions, to work on your plan.

The beginning of the year is a great time to do this but any time of you is perfect!

There is no prescribed amount of time to spend on each section of your plan. Different people will spend longer on some areas than others. Some will move faster than others because they have some planning already in place.

Where to begin

Start by getting clear what your top outcome is for the day.

Be prepared to get to the end of the day and not be finished.

At that point, set the next planning day.

DO stay with the process and give each area of the plan the time it deserves.

While it would be great to think that you could do the whole plan in a day, budgeting and digging into the details of marketing your business activity may take setting additional times where you can have the headspace to plan.

So, be sure to plan to plan again - especially before major projects.

Sample Schedule:

- Set your outcomes for the day
- Planning Session 1
- Break (15mins)
- Planning Session 2
- Lunch (30mins)
- Planning Session 3
- Break (15mins)
- Planning Session 4
- Next Steps
- Celebration/Reward

Planning to Plan

Start by getting clear on our outcome for the day. Is it to put in place some major milestones? Is it to map out all your marketing promotions? Is it to do a broad-brush plan but drill deep into your first promotion for the year?



Decide how much time you'll allocate to the various areas of planning (overleaf) and create a schedule that includes breaks. Determine what you'd be happy to accomplish in one day. (Remember, you can always continue on another day. Do your best to make good ground on this first day of planning.)

Four Areas of Planning

Consider these four areas (in this order) when planning.

1. Personal

Our business is there to serve us and to help us create the lives we dream of.

We can be our best selves in business when we give ourselves the care and nurturing that we need. Let's do this before we add in our marketing activity and start a list of to-dos.

What are the life/personal goals that you have for the year? Consider:

- time with family
- vacations and staycations
- self-care and retreats
- health and wellbeing goals
- visits with family or friends overseas
- personal and professional development
- a course you've been wanting to attend
- a skill you want to develop
- a race or event you want to participate in
- birthdays/anniversaries you want to be better planned for

Tip: Punctuate the year with things that bring you joy personally. Put those priorities in before you add in your business activities.

2. Business Activity

Next look at the activity that you want to fill your year with. Be sure to leave space for lead-time and preparation for each activity.

Start with the most important projects - the ones that are most exciting to you and which are most aligned with your goals.



Schedule the activity so that it gives you the ideal cash flow and monetary momentum and reflects any seasonality in your business. For example if you have a florist, you will have times of year that make most sense to create activity around.

But, if you have a service business that is not seasonal, then create your activity according to when you want to see cash flow realised in your business.

Leave yourself enough time to make a success of each project. It can often make more sense to spend longer preparing and marketing fewer activities than cramming in more activity.

The Activity Timeline

At HerBusiness we like to think of each project in terms of

- Time to plan the project
- Time to work on the details
- Delivery of the project

For example, an online course may be planned for 3 months, At three months out we may establish the basic information with the date, time, topic, speaker, venue and price confirmed and a budget completed.

Then we may take a few weeks to develop the email marketing, landing pages, webinar set up, social media posts, confirmation emails, speaker logistics.

This could take longer for a new program that requires time to be allowed for creative assets and branding to be developed.

Five weeks out we might start our marketing cycle.

Then the course is delivered. Following the course there is administrative clean up, reporting, analytics etc.

And, if we've done our job properly, there is a next step for participants of the course - some other activity that is a natural next step for some of the participants - either another course, or program or ongoing support.



The key dates for a course campaign are all plotted on our planner and may look like this.

The Activity Timeline Phases

	August	September	October	November	December
Course					

Each activity has three phases - the planning phase, the admin/implementation/marketing phase and the delivery phase. Allow ample time for each phase.

In the case of our sample - an online course...

Planning Phase: The purple is time for planning the event. At this time we might determine the date, time, topic being confirmed

Admin, Implementation and Marketing: The orange is when we develop the email marketing, landing pages, webinar set up, social media posts, confirmation emails, speaker logistics. Five weeks out we start our marketing cycle.

Delivery: The course is delivered through November and December.

Tip: Some examples of activities you can include — promotions, sales, product development and launches, trade shows, events, lead-magnet development, email sequences, segmentation, website development and improvement, systems development, customer service procedures, referral programs, joint ventures.

3. Marketing Activity

Now it's time to think about how you will market the activities on your calendar that require marketing.

Each activity will require its own planning time.

For example, while we might run our Businesswomen's Hall of Fame in March, our initial meeting is the April or May the previous year to set the big picture goals. You may not need that much lead time for your plans, but be sure to set time to plan your marketing activity. The more groundwork you can do early, the less pressure you have to turn things around at the last minute, the less stress you'll experience. And in my experience the better the results will be.

Keep the ideas high level and link them back to your business goals and cash flow goals. Don't get into all the detail. Instead stay high level and recognise when you might need to be developing marketing and what lead time you might need, and what resources you may need to allocate.

Questions to consider at this time:

Have you clarified who your ideal customer is? It will be easier to develop your marketing activity if you have a clear picture of who the customer is and what their needs are? If necessary, set time to do your client avatar work before you start creating content or marketing?

Do you have a clear product offer? Do you have something to sell that has compelling inclusions, a profit margin that is worth your time, and which helps your business be more profitable and sustainable? Have you costed out the product to ensure it's viable.

How will you promote your activity? Email marketing, website marketing, social networks, joint ventures, paid advertising, trade shows etc?

How will you deliver what you're going to sell? Is there time required for setting up delivery systems? Do you need need software, eCommerce or technology integrations?

What skills or knowledge might you need to better conduct your marketing? Set time to learn and study or seek support to implement?

4. Budget

As the fourth area of planning, start work (or continue work) on your budget.

If you already have a budget for your financial year then extend it another 6 months to the end of 2018. If you don't have a budget then do one for the calendar year 2018.

A budget is a forecast profit and loss.

It needs to show:

- Income
- Cost of Sales/Goods
- Gross Profit
- Operating Expenses
- Net Profit

If this is foreign territory to you, then it's important to get some education in this area. (Check the Learning Centre for resources or seek support from your book keeper or accountant.)

Your budget should correspond with your business activity for the year.

If you have a promotion in May - that will generate a good deal of revenue for example - then ensure this is reflected in your budget. If January is a quiet time - ensure that your budget reflects that and is not carrying an unrealistic amount of projected income.

We could go very deep on budgets, and at some point it's important to do so - but for now we want to have a good overall sense of how the year is predicted to look financially.



Planning Day Worksheet

1. My big vision for my business for [] is:

insert time period e.g. 2018, July to December 2018 etc.

2. My outcome for this Planning Day is:



3. The Personal Goals that I'll map on my plan are:

4. The Business Activity that I want in my year is:



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