



# You Created A Business Plan. Now What? A Step by Step Guide to Execute Your Business Plan

JENNIFER DAWN COACHING

# Overview

As a business owner TIME is your biggest asset

To make the most of TIME, you need to take **action** from a plan that is clear, focused, efficient and effective

Today we'll learn how to do that by creating a Marketing and Action plan

It will take TIME to get it setup – then you can FLY

This is INTERACTIVE – You'll need paper & pen

Come back to the RECORDING – We'll be moving FAST today

# To Get the Most From Today

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1

Eliminate  
Distractions

2

Clear Your Mind –  
Be OPEN

3

Do the Work /  
Come Back to  
Recording



# Hi, I'm Jennifer

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Jennifer Dawn Coaching & Consulting

Best Planner Ever

Happy Productive Podcast

Mother of 3

So happy to be here with you today

[www.JenniferDawnCoaching.com](http://www.JenniferDawnCoaching.com)

# The Problem



Traditional Business/Marketing/Action Plan is 40+ pages



Too large a document to really be useful



Difficult for you and staff to understand



Have to dig to find information / most people won't do

## The Solution

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Work from 1 page  
Business/Marketing/Action Plans

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Improves clarity and focus

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Easy to use on a day-to-day basis


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Team can understand purpose and  
direction of company

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Incorporate into personal use & team  
meetings easily

Sum up by answering 8 questions



If you know the answers, write them down



Some may require additional thought/reflection



Take your time with it / don't rush



Go back and watch the recording

Let's Begin:  
(Summary)  
1 Page  
Business  
Plan



# 8 Questions to Answer

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Who are YOU? (Core Values)

Who do you SERVE? (Your Ideal Customer)

What makes you unique? (What you do better than anyone)

What is your marketing strategy? (How will you get business?)

What's your 3-year target?

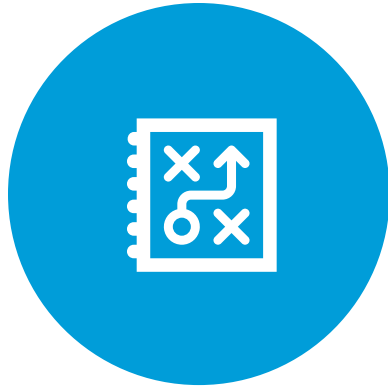
What are your 1-year goals?

What are your quarterly goals?

What are your issues? (What will stop you?)

# Create Your 1 Page Business Plan

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PLEASE GO THROUGH THE  
TRAINING



WE WON'T FOCUS ON THIS  
TODAY



TODAY WE'LL FOCUS ON THE  
MARKETING AND ACTION PLAN

## \*BONUS\* Question

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Not included  
in our original  
training

Very  
important to  
consider

# What's your NON-MONETARY Measures of Success?

What is the one thing that if you continue to deliver, you'll never go out of business. Your NMS is *how you measure the value you deliver*.

Refocuses on delivering value rather than revenue

Aligns entire company to its purpose

Every decision can be checked against your NMS.

## Examples

# of Clients who accomplish \_\_\_\_\_.

Customer ratings.

Average client lifecycle is longer than \_\_\_\_\_.

% of client goals hit.

Referral rate.

# What's Your Marketing Strategy?

How do you generate leads/purchases?

What sets your brand apart?

Your Proven Process – how you get results

Your Guarantee – your promise to the customer

INBOUND – what you do to draw a customer IN

- Website, SEO, Lead Magnet, Email, Social Media, Content Strategy

OUTBOUND – how you go OUT and after the business

- Tradeshows, PR, Linked IN, Direct Mail

# 8 Questions to Answer



What value do you create?



How do you do it?



Why do you do it?



What's your MTP?



What Pain Points do you Solve?



What Social Platforms?



What are Your SEO Keywords and Hashtags?



How do you market?

# #1 - What Value Do You Create?

One sentence – that a 3<sup>rd</sup> grader would understand

Examples:

- We support and develop entrepreneurs to have a business and life they are proud to own
- We take the headache out of accounting services for small business owners
- We help businesses get found on page 1 of google

CHECK & BALANCE: This becomes foundational in your marketing efforts.

If you look at a piece of your marketing how clear it is, what you do?

Every song you've ever owned.  
In your pocket.



**The new iPod.**

7,500 song capacity.\* Incredibly light and slim. Mac or PC compatible.  
The ultimate digital music player.

[www.apple.com/uk/ipod](http://www.apple.com/uk/ipod)

# Value = Outcome

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What value does your customer enjoy?

This is *not how you create or deliver value.*

Lose the ego. Don't sell **features**. Don't sell process.

Focus on the customers' outcomes.



## #2 - How Do We Do It?

These are your products and services – **Direct Revenue Sources** – Flushed Out in Detail

Examples:

- Coaching, Done for you Marketing Services, Content, Community
- Bookkeeping Services, Tax Preparation, Profit First
- SEO On and Off Page Optimization, Paid Traffic Ads

Are they clear?

Easy to understand?

Is there overlap or confusion?

Does your pricing make sense?

Have a coach take a look and get feedback.

If there is any confusion in your product/service offering, it will carry over into your marketing efforts!

# What are DIRECT Revenue Sources?

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*The products & services clients are paying for.*

Each should be distinct in their offering and/or delivery

More is *not better*.

## Examples:

### Services:

- Group coaching & 1:1 coaching are distinctly different in their sales & delivery process
- 1:1 1-hour coaching calls vs. 2-hour coaching
- Monthly subscription vs. project based
- In-person vs. videoconference
- Execution vs. Strategy
- Speaking engagements

### Products:

- Standard vs. customized products
- B2C direct vs. marketplace (i.e. Amazon or Etsy)
- B2B wholesale vs. vendor dropship
- Brick & mortar vs. ecommerce

### Other:

- Partnerships
- Sponsorships

# What are INDIRECT Revenue Sources?

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*The activities you do to **support** your direct revenue sources.*  
Again, more is not necessarily better.

Paid digital advertisements	Organic social media	Podcast	Cold outbound emails	Blogging	Networking events & groups
Tradeshows	Email newsletters	Press	YouTube / Videos	LinkedIn Outreach	Licensing
Direct mail	Custom Platforms	Online Communities	Referral Program	Webinars	Gifting



# Important Note About Revenue Sources

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- ⚠️ Your direct & indirect revenue sources are your business's *strategies*.
- ⚠️ Any change to your strategies is a fundamental change to how your business operates and interacts with clients.
- ⚠️ A change to your revenue sources should trigger a review of your *entire* business plan.

# #3 - Why Do You Do It?

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Why does this matter to you?



What's in your heart that calls you to do this work?



Just include 1-2 sentences



Your reasons for doing this work will resonate with the people who need HELP in this area



When you truly connect to your WHY it will help your marketing to be that much more impactful

## #4 - What's your MTP?

Massive (Audaciously Big and Inspirational)

Transformative (Can cause significant transformation to an industry, community, or planet)

Purpose (There's a clear "why" behind the work being done. Unites and inspires action)

- Google: To organize the world's information
- SpaceX: To make life multi-planetary
- Ted: Ideas worth spreading
- Jay Shetty: Wisdom gone viral
- Tesla: Accelerate the transition to sustainable transportation

You are **NOT** too small to have an MTP. What's yours?

# #5 - What Pain Points Do You Solve?

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Everyone in the world is suffering from the same 6 problems. Any person in the world will be able to relate to at least one of these:

- Relationships
- Health
- Money
- Career/Work/Business
- Self
- Faith

List out the pain points YOU help to solve



# Know Your Audience

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An effective marketing strategy means truly understand the struggles and problems of your audience.

Go deep

Look at your own pain points

What are YOU currently struggling with? Be willing to talk about your own problems, triumphs, lessons, and reflections.

Others will see themselves in your story

# #6 - What Social Platforms?

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Decide which social platforms you will be on

Don't try to be everywhere, you just spread yourself too thin

Choose platforms where your ideal clients are hanging out

## **Use social media for GOOD**

There are 5 genres that go VIRAL. Pick the one that appeals the most to you:

- Adventure
- Emotion
- Surprise
- Comedy
- Inspiration

# #7 - What are your SEO Keywords & Hashtags?

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Keep your messaging clear and consistent

What keywords will you repeat on your website, and in social media to drive organic traffic to your website?

What hashtags do you use for your brand?

Write these down.

Make sure they are part of your marketing strategy

If you don't know, get help from a professional

# #8 - How will you Market?

There are soooo many options for marketing.

You want at LEAST 3 sources of lead generation (think of a table, it needs at least 3 legs to stand)

Choose methods you like and will stick with.

HIRE this out if you hate marketing

“Stopping your advertising to save money is like stopping your watch to save time” Henry Ford

Good marketing is the key to growing your business and staying in business.

# Options

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Choose at least  
THREE



Then, do an evaluation of your current marketing efforts (we can help)



Make a list of ways you can improve



Create a strategy to improve each area until it's getting the results you want



Get help if you need it!

# How Will You Execute?

We've covered a lot ground

Do the work, get clear on these area, take the time you need

As you work through the Business & Marketing plan, you'll most likely start seeing gaps and actions to be taken

That's where the 1 Page Action Plan begins...

# 1 Page Action Plan

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A single page that organizes all high-level objectives and actionable tasks to accomplish your 3-year target.

## Three Sections:

12 Month Objectives

3 Month Objectives

30 Day Tasks

## 1PAP Contains:

Projects

Objectives

Milestones

Tasks

# Building Your 1-Page Action Plan

## Remember to include:

- Sales goals / revenue targets
- Key hires
- Product launches
- Stress tests (i.e. 2 week vacation)
- Changes in your role (i.e. no longer participating in sales calls)
- KPI's & success metrics

12 Month Objectives: What do you need to achieve to accomplish your 3 year goals



3 Month Objectives: What do you need to do to accomplish your 12 month objectives?



30 Day Tasks: What do you need to do this month to accomplish your quarterly goals?



Add in any projects, tasks, or objectives you're currently working on.  
(Are they still relevant?)



Check: does every objective or task relate to a revenue source?





# Implementation

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## Weekly

- Review & update 30-Day Tasks
- Many clients do this plan daily

## Monthly

- Update 3-Month Objectives
- Does everything on the plan support a revenue source?

## Quarterly

- Update 12-Month Objectives
- This review should occur every time a revenue source is added or removed

# Tips for Success



- 🗣️ The 1 Page Action Plan is an organizational tool. It does not represent all tasks required to run and scale your business – just the ones that are strategically important.
- 🗣️ Projects should be planned in another document or project management platform (i.e. Asana or Trello). Include strategically important project steps, milestones, and the overall project deadline in the 1PAP.
- 🗣️ Obsessively check your 1PAP against your revenue sources. If an entry on the Plan doesn't support a Direct or Indirect Revenue Source, it should be dropped! Pet projects are hobbies, not business strategies.
- 🗣️ If you have a team, a weekly team review of this plan can create POWERFUL momentum.
- 🗣️ Print this page weekly and tape it to your desk. Share it with your employees. You're the captain and this is your map to success.
- 🗣️ It's time to reassess the plan or seek coaching when:
  - 😞 A 30-day task has been delayed more than 30 days
  - 😞 A 3-month objective has been delayed more than 2 months

# Put It All Together



Compile everything  
for each Plan



Review with your  
team



Take time for areas  
where you are not  
clear



Link to it where you  
can see it



Refer to it **weekly** and  
update as you move  
through the year



Get help if you need  
it!

# Questions?

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**FREE 1 Page Action Plan Spreadsheet**

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