The Making of A Well-Designed Business: The Workshop



DECIDE To be Excellent



Establish Your Company Mission and Core Values

The Purpose of a Mission Statement

Having a mission statement is not just a formality—it's a powerful tool that shapes the culture, strategy, and success of a business. It's a reminder of why you started your journey and serves as a guiding light for the business, inspiring both you, the owner, as well all those involved with the company, internally and externally.

The Purpose of Core Values

Core values set the tone for your company culture and are a refelction of what you as the business owner hold most dear. They shape all interactions between people both internal and external to the company. These values are your non-negotiable pillars by which you run your business.

Establish Your Company Mission and Core Values

Homework



Reflect on the following questions:

- Who are you?
 - What principles are most important to me in both business and life?
 - What inspired me to start my business in the first place?
 - What aspects of my work bring me the most joy and satisfaction?
- Why Me? What sets my business apart from others in the industry?
 - How do we make a difference or solve a problem for my customers?
 - What is our core expertise or specialty as a company?
 - What do our most satisfied, best clients say about us?
 - How do I see my business evolving and growing over time?
- Who are my ideal customers or clients?
 - What needs or desires do we fulfill for them?
 - What challenges or problems do our products and services solve?
 - What do our current, most-satisfied, best clients have in common?
 - What spirations do our current, most satisfied, best clients share?
 - Who can afford and is willing to pay for our products and services?
- Why Does Anyone Care?
 - What impact do I want my business to have on my industry?
 - What role does social responsibility play in my business?
 - How can my business contribute positively to the community or the environment?
- What Will My Obiturary Say?
 - When I look back on my business in 20 or 40 years, what legacy would I like to leave?
 - How do I want people to remember me and my business?
- What Values Matter to Me?
 - How can my personal values be integrated into my business mission?
 - What principles from my personal life will guide my professional decisions?
- Now, Develop Your Mission and Core Value Statements
 - Are they expressed in a clear and concise manner?
 - Do they feel wonderful to you and inspire both you and others connected to your business?



Establish Your Company Mission and Core Values

To do today

Schedule dedicated time to do the homework assignment. First, glance through the homework and honestly assess, do you need more than one session to complete the work to the best of your ability? Honor yourself and your business by taking this step seriously and schedule accordingly.

To do this week

Update your website to reflect your mission and core values. Pay close attention to your "About" page as well as the "How We Work"/ "Our Process" page.

To do this month

Treat yourself! Beautifully design and frame your mission and core values to display in your office or studio.



Podcast episodes to listen to:

<u>#545 Laurel Smith</u> <u>#838 Regan Baker</u> <u>#188 Jane Cunningham</u> <u>#78 Vin Nigara</u>



Establish Your Company Mission and Core Values

Actionables:

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CHAPTER ONE:

Establish Your Company Mission and Core Values

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CHAPTER ONE:

Establish Your Company Mission and Core Values

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Establish Your Company Mission and Core Values





Establish Your Company Mission and Core Values







Your Dream Team

Positive Impacts of Assembling Your Dream Team:

- Legal Compliance
- Financial Stability
- Strategic Planning and Guidance
- Financial Management
- Networking, Collaborations and Partnerships
- Peace of Mind

Your Dream Team

Homework



Example of possible dream team members you need/want: Lawyer CPA CFO / Fractional CFO Bookkeeper Banker Business Advisor Business Advisor Business Coach Integrator / Fractional Intergrator Insurance Agent Financial Planner Hiring Consultant

- Peer Bestie
- Webmaster
- SM Consultant SEO Expert
- Copywriter
- Photographer
- PR Firm
- General Contractor
- Painter
 - Window Treatment Specialist
- Plumber Tiler
- Wallpaperhanger
- Upholsterer
- Flooring Supplier
- Electrician
- Architect
- Landscape Architect
- Organizations such as IDS, ASID, WCAA, Exciting Windows! Personal Trainer / Yoga Instructor Therapist
 - luannuniversity.com



Your Dream Team

To do today

Make a list of everyone on your Dream Team (see sample list on previous page)

To do this week

Identify any gaps you have right now between your business being what it is and what you would like it to be. Review your answers, can any of these be mitigated, improved or resolved by hiring a person, learning a skill, re-thinking your organizational chart, or forming a peer group for accountability?

To do this month

Review your most important dream team professionals: CPA, Lawyer, Bookkeeper, Insurance Agent, Business Coach. Do any of them need to be replaced? Do you need to schedule a review meeting with any of them? Do you have any items that need to be reviewed or revised by them, ie, your contracts, your insurance coverage, etc. Get on those.



Podcast episodes to listen to:

#464 Peter Lang #867 Casey Gromer #363 Eileen Hahn #489 Brad Clinard #921 Danielle Hendon #746 Daniela Furtado



Your Dream Team

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CHAPTER TWO:

Your Dream Team

Action Plan

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Your Dream Team





Your Dream Team







CHAPTER THREE:

Be A Systems Freak

Learning Objectives:

- Identify key systems and processes crucial for business success.
- Understand the importance of continuous improvement in business processes.
- Develop a plan for documenting, implementing or enhancing essential business systems.

Positive Impact of Documented Process and Systems:

Efficiency: Well-documented processes streamline operations, leading to increased efficiency. Owners and employees have clear guidelines for tasks, reducing errors and improving overall productivity.

Consistency: Documented processes promote consistency in how tasks are performed. This consistency contributes to the quality of products or services and enhances the customer experience.

Scalability: Defined systems and processes provide a foundation for scalability. As the company grows, having established procedures makes it easier to onboard new employees and adapt to increased demand.

Risk Management: Documented processes help identify and mitigate risks. It provides a structured approach to handling challenges, reducing the likelihood of errors, and ensuring compliance with industry standards.



CHAPTER THREE:

Be A Systems Freak

To do today

List the processes for which you have documented, dupliacatble processes and give yourself a high five, even if you have just one.

To do this week

List every system and process that you need to create and document. Decide, can you do any, some, all or none without help? Create a sublist of the ones that, if completed, would have the biggest impact on your and your business? The impact could be financial, it could be a good night's sleep – only you should decide which you need most now.

To do this month

Commit, schedule and priroitze documenting your systems and processes. By commit, I mean either schedule it in your calendar as a nonnegotiable recurring appointment or pay to outsource all or part of it.

C H A P T E R T H R E E :

Be A Systems Freak



- PTF Experts Vol 1:
 Sarah Daniele's chapter
- PTF Experts Vol 2:
 - Sara Brennan's chapter
 - Amber De La Garza's chapter
 - Desi Creswell's chapter
- Getting Things Done by David Allen
- Fix This Next by Mike Michalowicz



- <u>#545 Amy Youngblood</u>
- <u>#760 Jessica Harling</u>
- <u>#678 Katie McFarlan</u>
- <u>#607 Sara Brennan</u>
- <u>#530 Nancy Lane</u>
- <u>#445 Tori Alexander</u>



CHAPTER THREE:

Be A Systems Freak

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CHAPTER THREE: Be A

Systems Freak

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CHAPTER THREE: Be A

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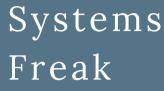
CHAPTER THREE: Be A

Systems Freak





CHAPTER THREE: Be A









CHAPTER FOUR:

How to Find Your Clients

Learning Objectives:

- Define your ideal client.
- Understand the importance of targeted marketing.
- Develop a personalized marketing strategy to attract ideal clients.



C H A P T E R F O U R :

How to Find Your Clients

To do today

Call at Least 5 Past or Current Clients:

- Ask why they decided to hire you.
- Ask if you delivered on that reason.
- Ask if they would recommend you.
- Ask what they would say when recommending you.
- Ask if they could make any observations about your business and or your process, what would they be?

To do this week

Fill out the below spreadsheet with all 2022 and 2023 clients.

**Please make a copy of <u>this sheet</u> before inputting your own client information.

To do this month

Make any adjustments to your website copy, your marketing copy, your business cards, etc to reflect the results of your data gathering exercise.



CHAPTER FOUR: How to Find Your

Clients



- PTF Experts Vol 1

 Nicole Heymer's chapter
- Dramatic Demonstration by Jude Charles



Podcast episodes to listen to:

- <u>#174 Fred Berns</u>
- Nicole Heymer- all episodes
 - <u>AWDB #125</u>
 - <u>AWDB #317</u>
 - <u>AWDB #466</u>
 - <u>WTFP #140</u>
 - <u>WTFP #167</u>
- Rachael Bozsik- all episodes
 - <u>AWDB #651</u>
 - <u>AWDB #759</u>
- <u>#256 Nancy Ganzekaufer</u>
- <u>#892 Sharon Sherman</u>



CHAPTER FOUR: How to Find Your Clients

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CHAPTER FOUR: How to Find Your Clients

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CHAPTER FOUR: How to Find Your Clients

Action Plan

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CHAPTER FOUR: How to Find Your Clients





CHAPTER FOUR: How to Find Your Clients







CHAPTER FIVE:

The Key to Profitable Selling: Own Your Worth

Learning Objectives:

- Understand the significance of every service provided.
- Recognize the impact of services on clients.
- Build confidence in your value proposition.
- Understand you are not selling a sofa, you are selling a service.
- Grasp the importance of aligning pricing with value provided.
- Understand the impact of pricing on client perception and satisfaction.



CHAPTER FIVE:

The Key to Profitable Selling: Own Your Worth

To do today

Evaluate if your fees are based on your needs or your values or with the needs and values of your ideal client. Revise any fees, percentages, services accordingly.

To do this week

Quote your next project at a higher rate.

To do this month

Set specific sales goals for 2024, by quarter. Be specific and decide your raise for 2024.



CHAPTER FIVE:

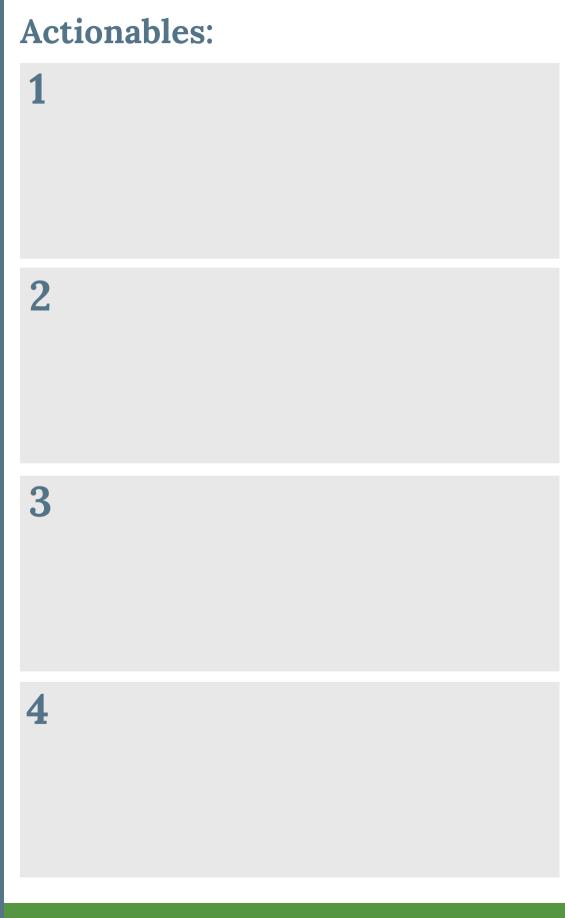
The Key to Profitable Selling: Own Your Worth

Books to read

- The Art of Selling to the Affluent by Matt Oeschsli
- Ninja Selling by Larry Kendall
- Never Split the Difference by Chris Voss
- Exactly How to Sell by Phil M Jones

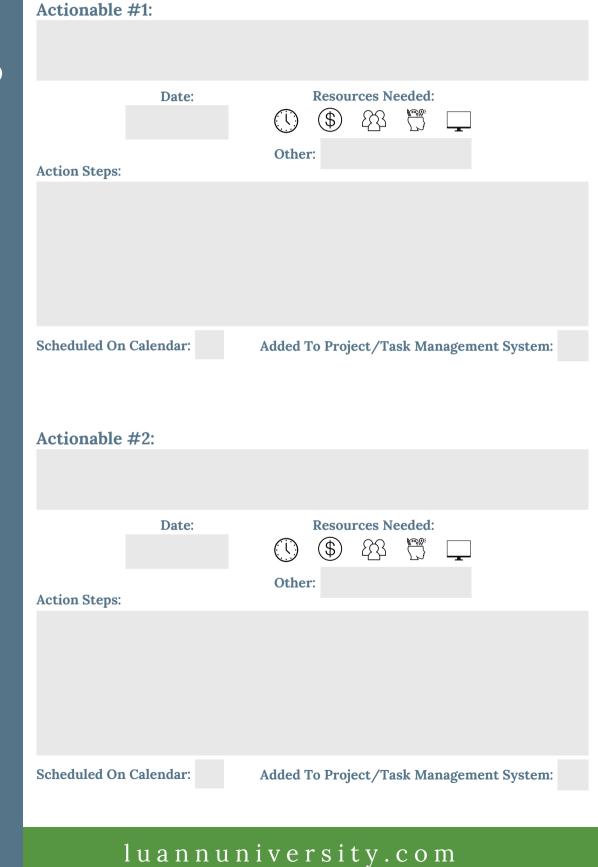


CHAPTER FIVE: The Key to Profitable Selling: Own Your Worth



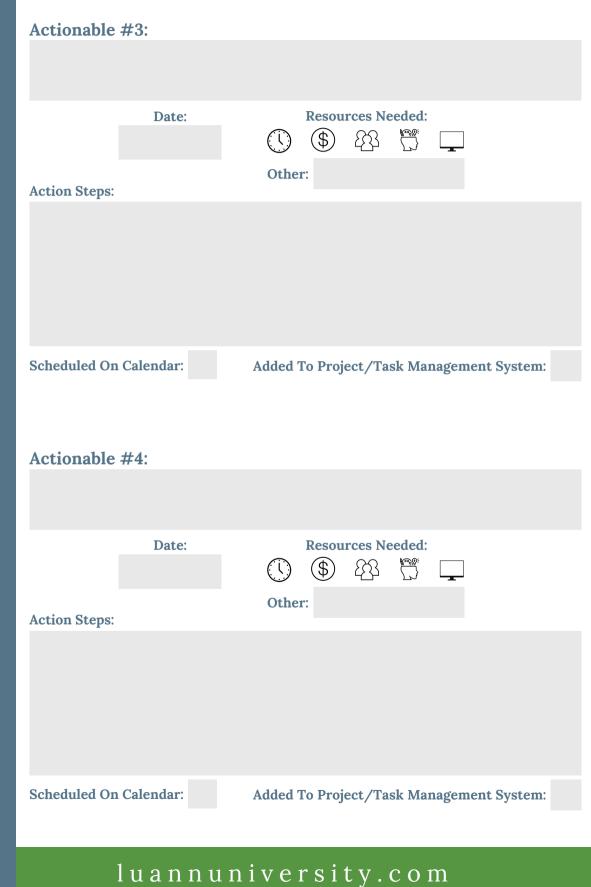
CHAPTER FIVE: The Key to Profitable Selling: Own Your Worth

Action Plan



CHAPTER FIVE: The Key to Profitable Selling: Own Your Worth

Action Plan



CHAPTER FIVE: The Key to Profitable Selling: Own Your Worth





CHAPTER FIVE: The Key to Profitable Selling: Own Your Worth







Learning Objectives:

- How to recognize the signs it is time to hire.
- How to evaluate what position to hire.
- Create a process to ensure an exceptional hire.
- Understanding the onboarding and training process is a key factor for success and satisfaction of new employees.

Homework



- Review the tasks you do everyday, week, month. Which do you like to do, are good at doing, do not like to do and are not good at doing?
- Ask yourself, why are you doing the things you do not like to do and are not good at doing. How can you change this?
- Consider, do you need to hire now? If you do, will you? If you do need to and you know you will not, what is plan B?



To do today

Create an org chart of your business as it is currently. Project 1 year, 3, years, 5 years, what would that org chart look like?

To do this week

Establish or review your team meeting structure. If you are a solo, do you have outside contractors, this still applies. (SM, Bookkeeper, etc).

To do this month

Create a HR folder for all existing employees and or for future employees. In addition to personal information on current employees it should include: Job Descritions, Job Postings, Interview Questions and Evaluation Guidelines.



Books to read

- The Job You Were Born For by Eileen Hahn
- Rocket Fuel by Gino Wickman
- Traction by Gino Wickman
- Clockwork by Mike Michalowicz



- Episodes is Hiring and Team Managemnet Collections:
 <u>AWDB</u>
 - WTFP
- With particular attention to these episodes:
 - <u>#363 Eileen Hahn</u>
 - <u>#589 Eileen Hahn</u>
 - <u>#634 Jessica Harling</u>
 - <u>#182 Jessica Harling</u>

Additional resources:

• <u>Check out these Hiring and</u> <u>Onboarding Toolkits!</u>



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CHAPTER SIX: Is It Time to Grow?

Action Plan

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CHAPTER SIX: Is It Time to Grow?

Action Plan

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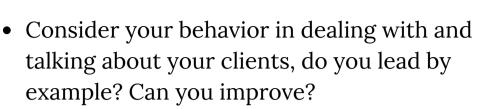
Customer Satisfaction, Guartenteed

Learning Objectives:

- Recognize the true difference between average and exceptional customer service.
- Recognize the value of exceptional customer service and how it connects to profitability.
- Understand the impact of reputation on client relationships.
- Establish systems for creating an exceptional client experience.
- Recognize all trades, suppliers, craftpeople represent you. As fara s your clients are concerned, their customer service actions are part of yours as well, good, bad, excellent.

Customer Satisfaction, Guartenteed

Homework



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• Consider your listening skills? Are you an active listener or are you typically considering your next point? Can you improve?



Customer Satisfaction, Guartenteed

To do today

Write a customer service statement for your company. Print it, share it, post it, commit to living it.

To do this week

Review your most critical, most employed vendors and trades, list the ones that need to go and research options for replacing them.

To do this month

Consider the legacy of your business. Imagine you are many years down the road. It is your retirement party. You are either selling your business (hopefully) or closing it and you are celebrating with family, friends, clients and members of your community. Write the introduction a valued friend or colleague will say when bringing you up to speak.



Customer Satisfaction, Guartenteed

Podcast episodes to listen to:

- <u>#781 Lori Morris</u>
- <u>#683 Jessica Matteson</u>
- <u>#678 Katie McFarlan</u>
- <u>WTFP #10 WWLD</u>



Customer Satisfaction, Guartenteed

Actionables:

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CHAPTER SEVEN:

Customer Satisfaction, Guartenteed

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CHAPTER SEVEN:

Customer Satisfaction, Guartenteed

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Be Prepared So You Can Be "Lucky"

Learning Objectives:

- Reflect on personal decision-making processes.
- Understand the significance of a mindset focused on excellence.
- Understand the value of doing all the work, all the time, in order to be "lucky".

Be Prepared So You Can Be "Lucky"

Homework



- Consider your opportunities to be the expert. What areas are of interest to you? What are you already good at or known as the go to on? Brainstorm in writing.
- Research trade associations, conferences and courses that can be resources for you to increase the areas of expertise and knowledge on your brainstorm list. Make a list including dates, prices, links.



Be Prepared So You Can Be "Lucky"

To do today

Select 6 areas from your brainstorm list, (12 if you are all in, lol), that you will commit to becoming the expert on this year.

To do this week

Assign your selected areas to a month on your calendar. Time block weekly slots to do the work of becoming an expert.

To do this month

Gather the books, podcasts and any other resources that will support each topic and load those links into your calendar for the specific month.



CHAPTER EIGHT:

Be Prepared So You Can Be "Lucky"



- Elegant Warrior by Heather Hansen
- Getting Things Done by David Allen



Be Prepared So You Can Be "Lucky"

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C H A P T E R E I G H T :

Be Prepared So You Can Be "Lucky"

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Be Prepared So You Can Be "Lucky"

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CHAPTER EIGHT:

Be Prepared So You Can Be "Lucky"





CHAPTER EIGHT:

Be Prepared So You Can Be "Lucky"







CHAPTER NINE:

Design Your Dream Business

Learning Objectives:

- Understand the power of visualization and intention in business.
- Develop a vision for your dream business.
- Understand the value in regularly revisiting and refining your business and life vision.

CHAPTER NINE:

Design Your Dream Business

Homework



- Schedule time to visualize your dream life and business.
- Develop a practice of regularly revisiting and refining your vision for yourself.



C H A P T E R N I N E :

Design Your Dream Business

To do today

Based on your aha's from the homework, decide today what must change in your business and or life. Write them down.

To do this week

Create a list of mantra's or quotes that will serve as reminders of how you want to live your life and run your business. Write them down.

To do this month

Create a vision board, Include your life goals, your business goals. See it, create it.



CHAPTER NINE:

Design Your Dream Business

Books to read

- The Greatest Salesman in the World by Og Mandino
- As Man Thinketh by James Allen
- Creative Visualization by Shakti Gawain



- <u>#189 Jan Bowen</u>
- <u>#842 Joshua Smith</u>



CHAPTER NINE:

Design Your Dream Business

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CHAPTER NINE: Design Your

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CHAPTER NINE: Design Your

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CHAPTER NINE: Design Your

Dream Business





CHAPTER NINE: Design Your

Dream Business







Practice Acknowledgment and Gratitude

Learning Objectives:

- Recognize the value of acknowledging wins and expressing gratitude.
- Understand the meaningful impact your business has on others.
- Develop daily practices for acknowledging successes and expressing gratitude.

Practice Acknowledgment and Gratitude

Homework



- Decide how you will develop a habit of acknowledging wins in your business and life.
- Acknowledge the impact your business has on your clients and your community.



Practice Acknowledgment and Gratitude

To do today

Write yourself a thank you note for taking the steps to improve your business because by doing that you will mprove yoru life and the life of those around you. Be specific and gracious and generous to yourself in this letter.

To do this week

Decide on a gratitude mantra and begin to say it every day, several times a day when you notice all the wonderful little and big things happening in your life.

To do this month

Write a letter, send a gift, make a gesture to someone who has been instrumental in your journey, life or business. Let them know how they helped you, inspired you, motivated you....share your gratitude with them and wish them well.



Practice Acknowledgment and Gratitude



• The Secret by Rhonda Byrne



Practice Acknowledgment and Gratitude

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CHAPTER TEN:

Practice Acknowledgment and Gratitude

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CHAPTER TEN:

Practice Acknowledgment and Gratitude

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Practice Acknowledgment and Gratitude





Practice Acknowledgment and Gratitude



