

LUANN UNIVERSITY

The Making of A Well-Designed Business: *The Workshop*

4-Hour Intensive
with LuAnn Nigara



CHAPTER ONE:

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 reflection 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.

CHAPTER ONE:

Establish Your Company Mission and Core Values

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 aspirations 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 Obituary 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?

CHAPTER ONE:

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:

[#545 Laurel Smith](#)

[#838 Regan Baker](#)

[#188 Jane Cunningham](#)

[#78 Vin Nigara](#)

CHAPTER ONE:

Establish Your
Company
Mission and
Core Values

Actionables:

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CHAPTER ONE:

Establish Your Company Mission and Core Values

Action Plan

Actionable #1:

Date:

Resources Needed:



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Action Steps:

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Added To Project/Task Management System:

Actionable #2:

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Resources Needed:



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CHAPTER ONE:

Establish Your Company Mission and Core Values

Action Plan

Actionable #3:

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Resources Needed:



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Action Steps:

Scheduled On Calendar:

Added To Project/Task Management System:

Actionable #4:

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Resources Needed:



Other:

Action Steps:

Scheduled On Calendar:

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CHAPTER ONE:

Establish Your
Company
Mission and
Core Values



CHAPTER ONE:

Establish Your
Company
Mission and
Core Values

CHAPTER TWO:

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

CHAPTER TWO: Your Dream Team

Example of possible dream team members you need/want:

Lawyer

CPA

CFO / Fractional CFO

Bookkeeper

Banker

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

CHAPTER TWO:

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](#)

CHAPTER TWO:

Your Dream
Team

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CHAPTER TWO: Your Dream Team

Action Plan

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Resources Needed:



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Actionable #2:

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CHAPTER TWO: Your Dream Team

Action Plan

Actionable #3:

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Resources Needed:



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Action Steps:

Scheduled On Calendar:

Added To Project/Task Management System:

Actionable #4:

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Resources Needed:



Other:

Action Steps:

Scheduled On Calendar:

Added To Project/Task Management System:



CHAPTER TWO:

Your Dream
Team

Notes

CHAPTER TWO:

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, duplicatable 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 prioritize documenting your systems and processes. By commit, I mean either schedule it in your calendar as a non-negotiable recurring appointment or pay to outsource all or part of it.

CHAPTER THREE: Be A Systems Freak



Books to read

- 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



Podcast episodes to listen to:

- [#545 Amy Youngblood](#)
- [#760 Jessica Harling](#)
- [#678 Katie McFarlan](#)
- [#607 Sara Brennan](#)
- [#530 Nancy Lane](#)
- [#445 Tori Alexander](#)

CHAPTER THREE:

Be A Systems Freak

Actionables:

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CHAPTER THREE: Be A Systems Freak

Action Plan

Actionable #1:

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Resources Needed:



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Action Steps:

Scheduled On Calendar:

Added To Project/Task Management System:

Actionable #2:

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Resources Needed:



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Action Steps:

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Added To Project/Task Management System:

CHAPTER THREE: Be A Systems Freak

Action Plan

Actionable #3:

Date:

Resources Needed:



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Action Steps:

Scheduled On Calendar:

Added To Project/Task Management System:

Actionable #4:

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Resources Needed:



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Action Steps:

Scheduled On Calendar:

Added To Project/Task Management System:

Notes

CHAPTER THREE:

Be A Systems Freak



CHAPTER THREE:

Be A Systems Freak

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.

CHAPTER FOUR: 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 [this sheet](#) 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



Books to read

- PTF Experts Vol 1
 - Nicole Heymer's chapter
- Dramatic Demonstration by Jude Charles



Podcast episodes to listen to:

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

CHAPTER FOUR: How to Find Your Clients

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CHAPTER FOUR: How to Find Your Clients

Action Plan

Actionable #1:

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Resources Needed:



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Action Steps:

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Actionable #2:

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Resources Needed:



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Added To Project/Task Management System:

CHAPTER FOUR: How to Find Your Clients

Action Plan

Actionable #3:

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Resources Needed:



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Action Steps:

Scheduled On Calendar:

Added To Project/Task Management System:

Actionable #4:

Date:

Resources Needed:



Other:

Action Steps:

Scheduled On Calendar:

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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 Oeschli
- 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

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CHAPTER FIVE:

The Key to Profitable Selling: Own Your Worth

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Resources Needed:



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Actionable #2:

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Resources Needed:



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Action Steps:

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

Action Plan

Actionable #3:

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Resources Needed:



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Action Steps:

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Actionable #4:

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CHAPTER FIVE:

The Key to
Profitable
Selling:
Own Your
Worth



CHAPTER FIVE:

The Key to
Profitable
Selling:
Own Your
Worth

CHAPTER SIX: Is It Time to Grow?

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.

CHAPTER SIX: Is It Time to Grow?

- 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?

CHAPTER SIX: Is It Time to Grow?

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 Descriptions, Job Postings, Interview Questions and Evaluation Guidelines.

CHAPTER SIX: Is It Time to Grow?



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



Podcast episodes to listen to:

- Episodes is Hiring and Team Management Collections:
 - [AWDB](#)
 - [WTFP](#)
- With particular attention to these episodes:
 - [#363 Eileen Hahn](#)
 - [#589 Eileen Hahn](#)
 - [#634 Jessica Harling](#)
 - [#182 Jessica Harling](#)



Additional resources:

- [Check out these Hiring and Onboarding Toolkits!](#)

CHAPTER SIX: Is It Time to Grow?

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CHAPTER SIX: Is It Time to Grow?

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CHAPTER SIX: Is It Time to Grow?

Action Plan

Actionable #3:

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Resources Needed:



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Action Steps:

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Actionable #4:

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Resources Needed:



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Action Steps:

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CHAPTER SIX:

Is It Time to Grow?



CHAPTER SIX:

Is It Time to Grow?

CHAPTER SEVEN:

Customer Satisfaction, Guaranteed

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 far as your clients are concerned, their customer service actions are part of yours as well, good, bad, excellent.

CHAPTER SEVEN:

Customer
Satisfaction,
Guaranteed

- Consider your behavior in dealing with and talking about your clients, do you lead by example? Can you improve?
- Consider your listening skills? Are you an active listener or are you typically considering your next point? Can you improve?

CHAPTER SEVEN:

Customer Satisfaction, Guaranteed

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.

CHAPTER SEVEN:

Customer
Satisfaction,
Guaranteed



Podcast episodes to listen to:

- [#781 Lori Morris](#)
- [#683 Jessica Matteson](#)
- [#678 Katie McFarlan](#)
- [WTFP #10 WWLD](#)

CHAPTER SEVEN:

Customer
Satisfaction,
Guartenteed

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CHAPTER SEVEN:

Customer Satisfaction, Guaranteed

Action Plan

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Actionable #2:

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Resources Needed:



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CHAPTER SEVEN:

Customer Satisfaction, Guaranteed

Action Plan

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Resources Needed:



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CHAPTER SEVEN:

Customer
Satisfaction,
Guaranteed



CHAPTER SEVEN:

Customer
Satisfaction,
Guaranteed

CHAPTER EIGHT:

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”.

CHAPTER EIGHT:

Be Prepared
So You Can
Be “Lucky”

- 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.

CHAPTER EIGHT:

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”



Books to read

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

CHAPTER EIGHT:

Be Prepared
So You Can
Be “Lucky”

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CHAPTER EIGHT:

Be Prepared
So You Can
Be “Lucky”

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CHAPTER EIGHT:

Be Prepared
So You Can
Be “Lucky”

Action Plan

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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

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

CHAPTER NINE:

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



Podcast episodes to listen to:

- [#189 Jan Bowen](#)
- [#842 Joshua Smith](#)

CHAPTER NINE:

Design Your Dream Business

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CHAPTER NINE: Design Your Dream Business

Action Plan

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Added To Project/Task Management System:

CHAPTER NINE: Design Your Dream Business

Action Plan

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Resources Needed:



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Actionable #4:

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CHAPTER NINE:

Design Your
Dream
Business

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CHAPTER NINE:

Design Your
Dream
Business

CHAPTER TEN:

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.

CHAPTER TEN:

Practice
Acknowledgment
and Gratitude

- 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.

CHAPTER TEN:

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 improve your 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.

CHAPTER TEN:

Practice
Acknowledgment
and Gratitude



Books to read

- The Secret by Rhonda Byrne

CHAPTER TEN:

Practice
Acknowledgment
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CHAPTER TEN:

Practice Acknowledgment and Gratitude

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Actionable #2:

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Resources Needed:



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Action Steps:

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Added To Project/Task Management System:

CHAPTER TEN:

Practice Acknowledgment and Gratitude

Action Plan

Actionable #3:

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Resources Needed:



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Action Steps:

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Actionable #4:

Date:

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CHAPTER TEN:

Practice
Acknowledgment
and Gratitude



CHAPTER TEN:

Practice
Acknowledgment
and Gratitude