



UPLEVEL YOUR BUSINESS PLAN



**The Upleveling Your Business
Fast Track Way**



The Four Pillars of Successful Business Management

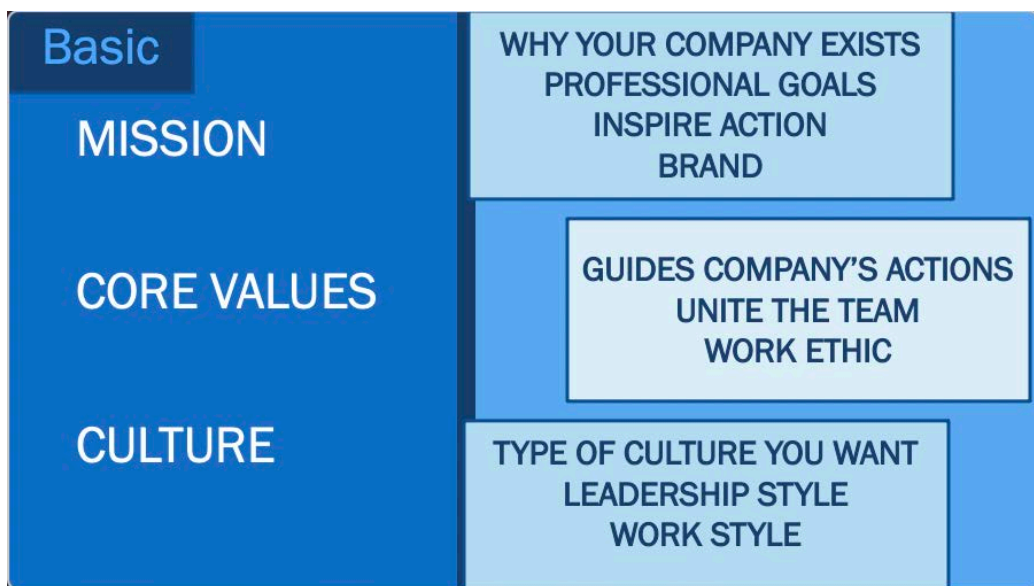


- **The First Pillar is Planning.** As shown by the small arrow on the left, a little planning goes a long way.
- **The Second Pillar is Marketing/Sales.** The most important thing to building a thriving business is to develop marketing that brings the right person in the door so they can become clients.
- **The Third Pillar is Management.** Once you have clients you need to focus on serving them and creating an amazing client experience.
- **The Fourth Pillar is Financial Controls.** As you grow the business this pillar becomes more and more important otherwise all the hard-earned money that comes in goes right back out the door.



Pillar 1: Planning

- 1) Refine the Vision of What You Want to Build.
- 2) Make Sure the Team is Onboard.





Pillar 1: Planning

Do you need to update your written Mission, Core Values and Culture Statements and if so by when?

How will you incorporate your Mission, Core Values and Culture into your Marketing and Sales?

How will you incorporate your Mission, Core Values and Culture into your Day to Day Operations? Your Team Builders? Your Team Newsletters?

How will you incorporate your Mission, Core Values and Culture into your Client Messaging? Your Client Happiness? Your Client Interactions?



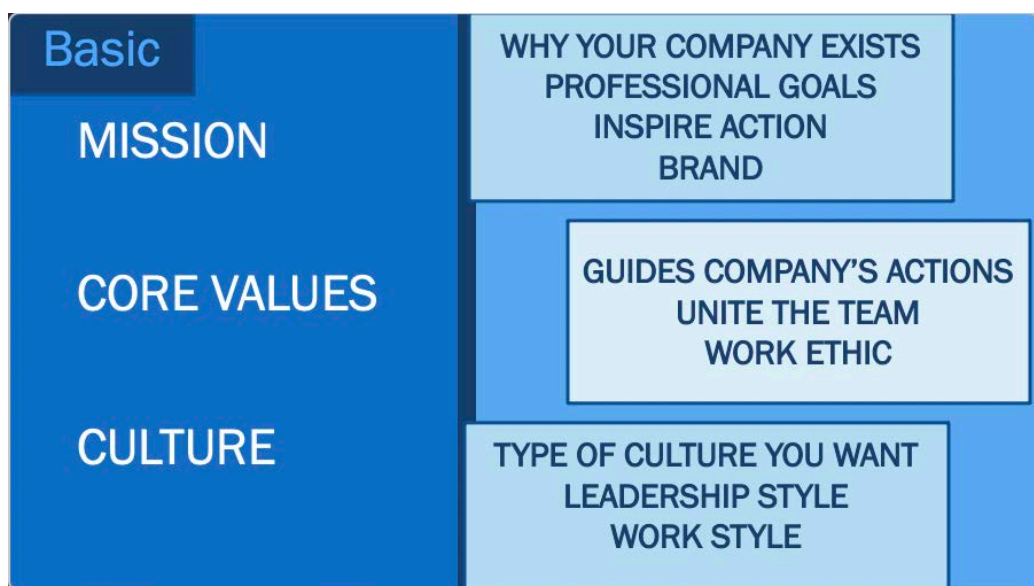
Update Your 5 Short-Term Needs (hint cashflow is usually on this list)?

Update Your Long-Term Goals for this business.



Pillar 2: Marketing and Sales

- 1) Refine the Vision of What You Want to Build.
- 2) Make Sure the Team is Onboard.





For Marketing and Sales, I currently grade my business

A+ A A- B+ B B- C C- D+ D D- F

Sales:

Update Your Sales KPIs for Your Sales Team

Update Your Target Sales Numbers by Quarter.



Marketing

What Marketing Campaigns and Pocket Campaigns Will You Run in 2022?

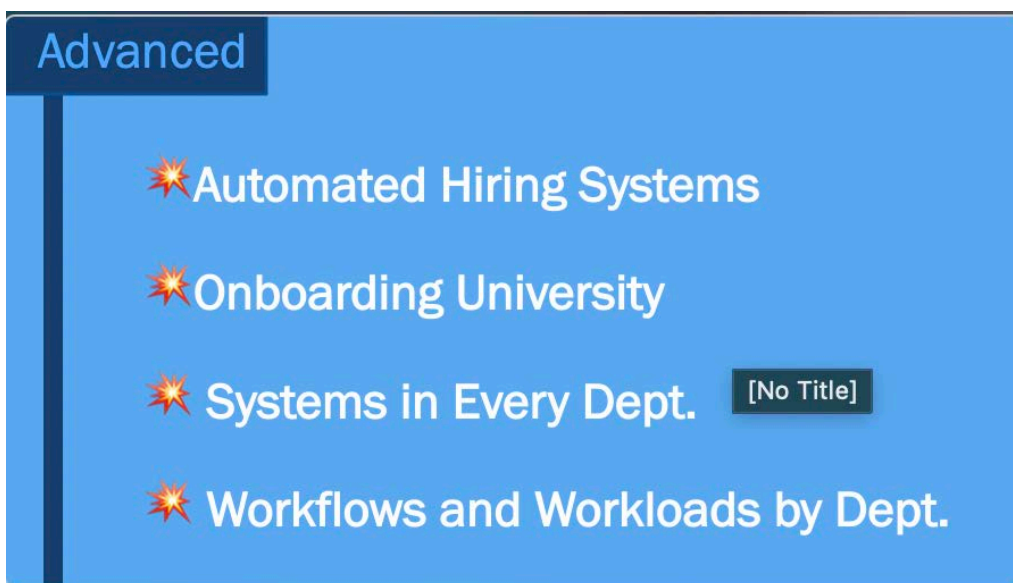
Update Your Target Numbers and How Will You Improve Your Tracking in 2022?

Name 3 ways you can improve your debriefs and marketing systems to be more successful in 2022?



Pillar 3: Management

- 1) Refine Your Hiring and Onboarding Plan.
- 2) Build out the Systems
- 3) Map Your Workflows and Workloads.





For Management, I currently grade my business:

A+ A A- B+ B B- C C- D+ D D- F

Staffing:

Who do you need to hire in the next 4 quarters?

Who do you need to hire first?

What will you do to improve your hiring and onboarding systems in 2022?



Workflow:

Describe how you currently do what you do:

What improvements would you like to see in the next year?

What needs to happen to make those improvements happen?

Systems:

I currently have the following Systems running smoothly in my business (Sales systems, marketing systems, work flow systems, hiring/ firing systems, etc)

I intend to do the following to improve my systems over the next 4 quarters:



Supporting Your Team with the Right Tools:

What tools will your team need to do a good job?

Do you need more space for your people or your inventory?

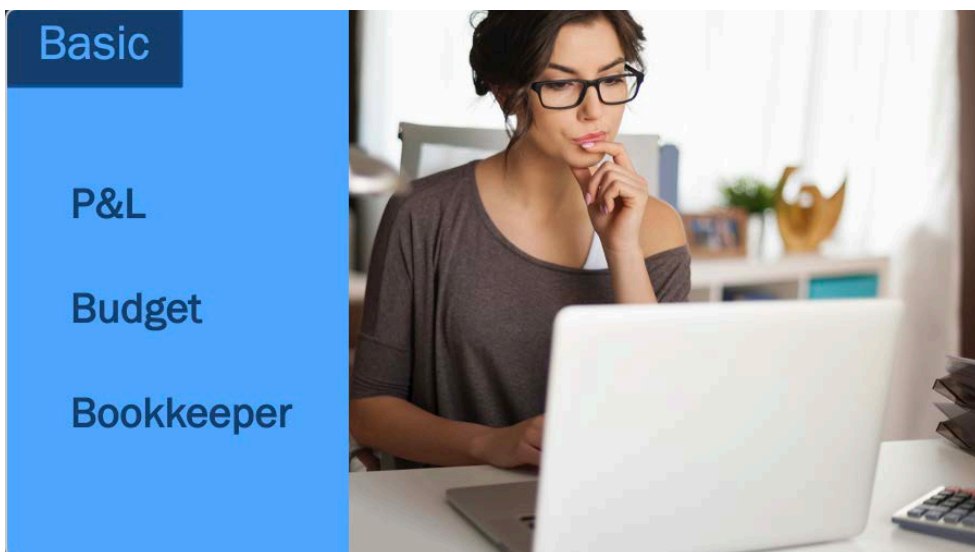
What furniture or equipment do you need to purchase or replace in the next 4 quarters?

How might you outsource some duties over the next 4 quarters?



Pillar 4: Financial Controls.

- 1) Know Your Budget and Stay Profitable
- 2) Forecast for Scaleability.





For Financial Controls, I currently grade my business:

A+ A A- B+ B B- C C- D+ D D- F

My financial controls team is made up of the following individuals to help me be a good money manager. (CPA, bookkeeper, billing clerk, etc)

Lag Metrics:

My business reviews: currently within 3 months within 6 months
Monthly Balance Sheet
Monthly Profit & Loss (P&L)
Monthly Budget
Budget Variance Report
Accounts Payable Report
Accounts Receivable Report
Daily Posted Cash Report

Lead Metrics:

Sales Report
Pre-Sales Report
Marketing Report: online
Marketing Report: networking
Marketing Report: calls
Marketing Report: referrals
Marketing Report: other



Next Steps: Ways to Streamline



6 Week Boot Camps

Sometimes the best way to get it done is to enter a program that will hold you accountable.

Our **Hiring and Onboarding Boot Camp** guides members of your team on how to automate your hiring systems and build your Onboarding University in an engaging and streamlined fashion. This Boot Camp gives you over 250 documents, scripts examples and templates and supports your team with Office Hours twice a week.

Our **Workflows and Workloads Boot Camp** guides you and your team on how to build Workflows for every Department of your business. We then break down the time spent and enter it into our special Workloads Calculator to determine your Gross Profit Margin and guide you to Forecasting,



Systems Package

Equip your Team with Systems they need! From our Financial **Systems Manual** to our Sales Systems Manual we help you break down your different departments so you team can work in a more streamlined fashion and with greater clarity on what they need to work on!

Looking to Hire and need with what they will do? Our Staffing Packages will guide you through How to Hire, Onboard and Work with a variety of positions from Executive Assistants, Marketing Assistants, Marketing Coordinator, Client Happiness Coordinator and Client Engagement Specialist! Each comes with a 25+ page Policies and Procedures Manual, short videos, and plenty of examples and templates to help you get that person profitable ASAP!



Coaching Program

Every Business needs help with different things at different times. That is why our Coaching Program starts you off with a solid Plan and then allows you to work with the Coach that you need in that moment, From Marketing to Sales to Financial Controls we have you covered with one-on-one coaching while also helping you build your systems. You also have access to our Culture/ Management Coach, Systems Coach, Client Happiness Coach and even our Copywriter!

Visit: <https://www.UplevelingYourBusinessSystems.com>

or email: ClientEngagement@uplevelingyourbusiness.com



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