THE HOWARD PARTRIDGE

SIMPLE DIMPLE

BUSINESS PLAN

SPONSORED BY Ziglar AND PHENOMENAL™ PRODUCTS, Inc.

STOP Being a SLAVE To Your Business!

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Company Name

Plan For Year

Date Plan Created

Step 1 My Business Vision for the Next 12 Months

Describe how you see your business being different this year. A vision is a "picture" of your preferred future. Your vision will include sales numbers, staff changes, equipment purchases, new products or services. Just let your imagination run on this exercise. List everything you would like to do.

Staff Changes (if any):

(Update Your Org. Chart)

Equipment or Resources to Add):

New Initiatives (New Services, New Markets, etc.)

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Step 2 Assess Your Business

Rate each of the following statements on a scale of 1 – 10 as they exist in your business right now.
1=Poor. 10= Phenomenal. Then divide your total number by 10 and enter that number.
Example: 52 ÷ 10 = 5.2

1. Marketing

Meeting or exceeding my sales goals through effective lead generation and promotions
We have a clear position in the marketplace
We have clearly defined our prime target market
We have clear definitions of our product and/or services
We have a pricing strategy that is profitable
We are consistently marketing to our house list (client base)
We have an effective referral relationship program
We have an effective referral/affiliate reward system
We have a written, posted marketing calendar
We have an effective Internet marketing system that includes websites(s) that clearly communicate what we do, and we are consistently capturing e-mail addresses and using them to communicate to our e-mail audience, and we have a strong presence on social media

TOTAL ÷ 10=

2. Sales

We answer the telephone live
We have effective telephone answering/transferring systems
We have an effective sales script that appeals to our target market and closes the maximum number of inquiries
We have an effective system for responding to Internet leads
We have an effective sales process for each of our profit centers
We have an effective up-sell and down-sell process
We have effective processes and scripts for overcoming objections
We have an effective process for identifying ongoing and changing customer needs
We have clearly defined account management policies and procedures
We have effective customer management software in place

TOTAL ÷ 10=

3. Operations

We have developed our unique service experience
We have clear/cut service systems in place that are exceeding our client's expectations
We respond immediately to client concerns
We have clear cut return/refund policies
We get customer feedback on a regular basis to ensure we are exceeding expectations
We have regular production meetings to ensure on time delivery
We have a key customer appreciation process
We have effective project management processes in place
We have inventory management and office supplies/equipment processes in place
We have the latest, most effective equipment to deliver our unique service experience

TOTAL ÷ 10=

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4. Administration

We track and report sales by profit center weekly, monthly and annually
We track and report total sales daily
We track and report sales by referral/affiliate/ad source weekly
We track and report sales closings daily (# of calls vs. # of sales)
We track and report number of returns or re-services as they occur
We track and report our profit and loss weekly
We track and report our balance sheet monthly
We have a cash flow management process in place that includes systems for Accounts Payables and Accounts Receivables
We plan our taxes annually before year end
We review our legal and insurance exposure annually (or as often as required)

TOTAL ÷ 10=

5. Leadership

We have a compelling vision statement that everyone understands and follows
We have effective management systems in place that includes recruiting, hiring, orientation, training, coaching, employee reviews and termination processes and have ensured they are legal
We have an up to date employee handbook
We have a written business plan that includes our vision, goals, a marketing plan, sales plan, operating plan and administration plan that is reviewed and updated quarterly
We have a written and posted organizational chart
We have regular team meetings
We have written performance results description for every position
We have a training system in place for every position
We have policies and procedures for all areas of our business
We have an effective compensation plan in place that includes attractive pay and benefits that create high employee morale and retention

TOTAL ÷ 10=

Circle the number on the corresponding spoke, then draw a curved line connecting the dots.

When your business wheel isn't balanced it makes for a rough ride. Get your business balanced, and you'll go smoother down the road.

Make your wheel a 10 all the way around and you'll have a phenomenally successful business!

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Step 3 S.W.O.T. Analysis

According to the Business Assessment, fill in the S.W.O.T. Analysis

Strengths of my business:

Weaknesses of my business:

Opportunities I need to take advantage of this year:

Threats that could damage my business that I need to be aware of:

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Step 4 Set Your Sales Goal and 12 Month Financial Forecast

Follow the directions on the Inner Circle website under Administration to create your 12 month financial forecast. Attach to this plan.

The "Simple-Dimple" Thumbnail Budget

1. Determine what Net Income you want. This is the amount you need before taxes to reinvest in your business and to compensate yourself.
2. Determine what your Fixed Expense is. Add your Net and your Fixed Expense to get your Gross Profit.
3. Determine the % of Sales your Gross Profit is running now and divide Gross Profit by that %.
   Example: If your Gross Profit is 55%, take the Gross Profit and **divide** by .55

My 12 Month Budget

$	Sales (All Revenue)
- $	Cost of Services Sold (COGS)
= $	Gross Profit (GP)
- $	Fixed Expense (Overhead)
= $	Net

Step 5 Create Your M.V.P. (Mission, Values and Purpose)

Our Mission: Create a one sentence Mission Statement that describes **WHAT** you and your team must **do** each day to accomplish the vision. Example: "Provide the Most Phenomenal Service Experience Ever" or "Create the Most Phenomenal Community Experience Ever."

Our Values: Create 3 to 5 Values that describe **WHO** you and your team needs to be to accomplish the mission. Example: Reputation (we must demonstrate trust), Experience (we must gain experience in all aspects of our industry), Education (we must train ourselves thoroughly to accomplish the mission), Systems (we must operate by systems rather than making it up every day to accomplish the mission), Guarantee (we guarantee our work 100% if we do not accomplish the mission). Values could also be integrity, honesty, character, thinking big, the golden rule, etc.

Our Purpose: Create a one sentence Purpose Statement that explains **WHY** your company matters to your community. Example: "To Help Small Business Owners Have More L.I.F.E. (Live In Freedom Everyday)" or "To Protect Our Community from Unscrupulous Service Companies".

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Step 6 Organization Chart

Describe the positions in your company and place them in the appropriate boxes. Then put the initials of the person(s) that fill that role. What boxes will you get out of this year? What staff changes will you make?

As Is

LEADERSHIP	MARKETING	SALES	OPERATIONS	ADMINISTRATION
Directing (Planning)				
Managing (Supervising)				
Implementing (Doing)				

Should Be

LEADERSHIP	MARKETING	SALES	OPERATIONS	ADMINISTRATION
Directing (Planning)				
Managing (Supervising)				
Implementing (Doing)				

Step 7 Create Your Performance Results Descriptions (PRD)

Create a PRD for each Position on the Organizational Chart. See Inner Circle Online Training/Leadership to learn about PRDs and to download the document.

(Insert your PRD into your binder)

Step 8 Create Your Phenomenal Marketing Plan with the "7Ms" of Marketing

1. **Marketing Mindset:** (What happens when you don't market your company properly? Notate WHY it is so important for you to aggressively market your company. What are the benefits of implementing your marketing consistently?)

Notate how you need to change your mindset in order to make sure you have a consistent flow of the right prospects.

Attach your sales reports: Sales by Category and Sales by Source. You'll need this tracking to set your goals.

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2. Mission: (keep your mission in mind as you are doing your marketing plan). Restate your mission again here)

3. Money: Break Down Your Company Sales Goal.

1. Take your Sales Goal from Step 4 and fill in here: $.
2. Break it down by the month: $ per month (Average). Once you study your history, you can adjust your months up and down depending on seasonality.
3. Break it down by the week: $ (per week).
4. Break it down by the DAY: $ (per day).
5. Track the Daily Sales Goal with your team (every day).

Marketing Investment: Determine how much you will commit to your marketing.

$ (Per Year) $ (Per Month)

4. Market: Identify Your Prime Target Market: (Describe your perfect client, patient, guest or member.

Demographics:

Gender Age Geography

Household Income (If you don't have this information, do a client survey).

Business Income (if business clients).

Psychographics: Lifestyle and buying behaviors.

Lifestyle: (Include whether they are family oriented, their faith, do they have pets? Children? What kind of work do they do? What kinds of clubs to they belong to? What charities are they involved in. Continue to list everything you can to describe their lifestyle).

Frustrations: What is your target market's top 3 problems or frustrations as they relate to your industry? What do your competitors do (or not do) that frustrate your target market?

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Desires: (What does your client want? What (and who) do they want to become?)

Buying Behaviors: (How to they buy primarily? Do they buy through referrals? Advertising? Internet? Direct Sales?)

List Segments: (list the different segments of your list. Example: Prospects, Hot Leads, Specific lists, clients, members, VIPS, Referral Sources)

5. Message: The Howard Partridge 5 Point Marketing Message "UEP" (Unique EXPERIENCE Proposition)™
Identify and create your unique experience proposition by filling in these 5 points:

1. REPUTATION
Featured: (List any publicity, public awards or recognition you or your company has received that would create trust with your target market. Example: "Featured on Channel 11, 13 and 26")

Benefit of Reputation (Trust): (What is the benefit of your reputation? Example: Peace of mind).

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2. EXPERIENCE

Years in Business (or years doing what you do):

Experienced in: (List areas of expertise or specialized knowledge that will benefit your target market)

Example: "I started my first business out of the trunk of my car over 30 years ago. I've helped thousands of small business owners in hundreds of industries dramatically improve their businesses for the past two decades. If it exists, I've probably experienced it"

Benefits of Experience: (List the benefits or choosing someone with your experience)

Example: "By choosing an experienced firm, you'll save time, money and energy and possibly avoid the pitfalls associated with inexperience).

3. EDUCATION

Training/Certifications: (List the awards, certifications, or training you have that benefit your clients)

Example: "Our company is certified by X and stays on the cutting edge of the newest industry information".

Benefits of Education: Describe the benefit of choosing a trained company. Example: "Choosing a company that has the proper training, saves you time, money and energy" .

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4. SYSTEMS

What's Unique About Our Delivery: (List what is unique about the service experience)

Example: "Our company offers first-class service systems which include making the appointment on time and treating you and your family/staff/etc. with the utmost of respect and courtesy, while being as efficient as possible. Our staff will communicate with you throughout the service to insure that you are thrilled with the overall experience. We offer the most advanced technology on the market giving you maximum results (be specific about this).

Define Specific Steps/Processes:

Benefits of Systems: Describe the benefits of customer service and your technical systems. Example: "Avoid wasting time, money and energy on companies that don't show up on time, or communicate throughout the service experience."

5. GUARANTEE

Our Overall Guarantee: (Describe how you handle complaints and/or refunds).

Example: "We offer a 100% (put a time frame if a product) guarantee. If you aren't completely thrilled with the service/product, simply let us know and we'll rush to your aid. If you're still unimpressed, we will refund 100% of your investment."

Benefit of Guarantee: Describe why a guarantee is important to a prospect. Example: "You don't have to worry about being taken advantage of by unscrupulous companies."

List Specific Offers and Promotions: (List offers and promotions that have been effective in the past).

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List Specific Copy Points and Headlines: (Keep a list of your power words, headlines and marketing copy that resonates with your target market and that has done well for you)

6. Methods – Your Marketing Methods are the strategies you use to attract your perfect target market.

Experiential Marketing (This method is designed to position your company and set you apart from the competition). List all the "experiences" you will use to engage, educate and entertain to convert suspects into prospects. Examples: Free Sample, Free Service, Free Report, CD, Video, E-mail Tips, Classes, Food Gifts, Breakfast, Lunch, etc.

Referral Marketing (This method is building relationships with companies and individuals that have influence with a large number of your prime target market). Example: Ziglar, Inc. is a Referral Source for Phenomenal Products and Phenomenal Products is a Referral Source for Ziglar. My service company was built through relationships with high-end referral sources where our prime target market shops. This is how I generate an unlimited supply of pre-qualified prospects for my companies.

List your Referral Sources or attach your list.

Outline the experiences you'll provide for referral sources. Monthly visits, lunches, presentations, etc.

Describe your Referral Reward Program. Examples: 10% of First Order, $500.00, Gift Card, etc.

Client Base Marketing (This is reaching out to your past and existing customers, clients, patients, guests or members) Examples: Monthly Mailer, Weekly E-Mail, Phone Calls, Send Out Cards, etc.

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Direct Advertising (List any and all ads that you plan to place and/or that are currently running).

Direct Selling (Direct Selling is where you call directly on your prime target market. List or attach prospect list, and determine whether you will call on them in person, over the phone, a combination, and what the process will be to convert them from a suspect to prospect and then to customer).

Internet Marketing (This includes websites, blogs, social media, online ads, and SEO if any. List methods you will employ and what needs to be updated).

7. M.A.P. (Marketing Action Plan) List what you will do each day, weekly, and monthly.

Daily	**Weekly**
Examples: Social Media, Client Base Calls.	Examples: Weekly Networking Groups, Referral Marketing Calls, E-Mail Newsletter **Monthly** Examples: Monthly Mailer

Specific Marketing Campaigns

Attach Marketing Campaigns that include:

List of prospects or clients, date to reach the list, date marketing pieces to arrive, date marketing pieces to be ready, date campaign piece needs to be designed.

Example: Conference Mailer

Date of Event: April 30th – May 2nd

Date Mailer to Arrive: March 1st, 30th and April 16th

Date Mailer to Be Mailed: Feb 27th, March 28th and April 14th

Date Mailer to Be Ready: Feb 13th

Date Mailer for Final Proof: Feb 1st

Date Mailer to Be Created: January 15th

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Master Project List

Use this section to brainstorm. Add anything and everything you might want to do this year.

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Phenomenal Four Projects (Next 90 Days)

List the four projects that will have the BIGGEST impact on your business in the next 90 days. List these in your Ziglar Planner and Pocket Planner. When you complete a project, update your phenomenal four in your planners.

(Review your Business Assessment and discuss with your coach for ideas)

1

2

3

4

Often times you'll find your TOP 4 projects by identifying your biggest opportunity or your biggest pain point.

Daily Time Capsule

Every day (except your rest day), invest at least one hour working on your Phenomenal Four Projects. Determine what the next ACTION STEP is on your project and put that in your Ziglar Performance Planner for that day.

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