BUSINESS PLANNING WORKSHOP

WITH MELISSA HENAULT

PRE WORK

POST MORTEM OF THE YEAR

What worked well?

What do you ned to improve?

Why are you in business? What drives you?

Build your theme for the year:

DAY 1: PRIORITIZE LIFE & BUSINESS

LIFE PRIORITIES - WHY

Revisit your “Why” and intention for the year as a business owner:

Reality: Household operating budget and your contribution:

Reality: Business operating budget and your contribution:

LIFE PRIORITIES: DREAM TIME

How much more do you need to bring in personally to contribute to your household income to meet your goal?

How much more in business do you need to make to bring that revenue into your home?

DAY 1: PRIORITIZE LIFE & BUSINESS

LIFE PRIORITIES: DREAM TIME

What is your dream schedule?

What do you desire MORE of this year in your calendar that you can get in control of NOW?

LIFE PRIORITIES: BIG ROCKS

Vacations, kids breaks, birthdays, personal development trips, personal well being (chiro/massage/pickleball/tennis weekly etc)

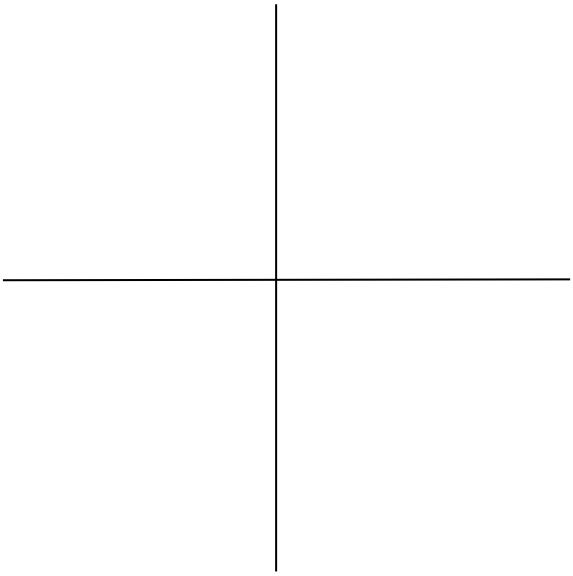
DAY 1: PRIORITIZE LIFE & BUSINESS

BUSINESS PRIORITIES - WHAT

2024 vs 2025 offer comparison to meet financial goals:

Assess, revenue goal for 2025 and WHERE it will come from:

T graph of last years offers and sales vs this years offers and sales goals:



Reverse engineering where the revenue comes from to meet your goals (Your offers/new offers and pricing to meet your growth goal)

DAY 2: HOW

DESIGN YOUR BUSINESS PLAN FOR THE YEAR TO MEET YOUR SALES GOALS

BUILD: TOP OF FUNNEL

- What are your top of funnel strategies to get eyeballs on your services next year?
- Who is responsible: Create metrics to support initiatives above to track monthly, quarterly, annual goals

GROW: CUSTOMER JOURNEY TO CONVERSION

- What is your sales strategy?
- How often do you need to promote
- How many eyeballs do you need to get on your offer to meet the conversion you desire for sales
- Offer optimization, pricing, journey to purchase, experience upon purchasing and onboarding
- WHO is responsible for for each step above?
- HOW will you measure your progress?

DAY 2: HOW

SCALE: BUSINESS OPTIMIZATION & RETENTION STRATEGIES

- Offer ladder optimization
- Client retention strategies
- Backend optimization opportunities to operate effciently

Analyze GAPS in knowledge or support to support your goals

- New team players to support your goals?
- Mentorship to expand your growth here?

DAY 2: HOW

MAP OUT INITIATIVES FOR THE YEAR

ROCKS

- Program Calendar (or multiple programs)
- Sales Calendar (runway to conversion of each event mapped out)

SAND

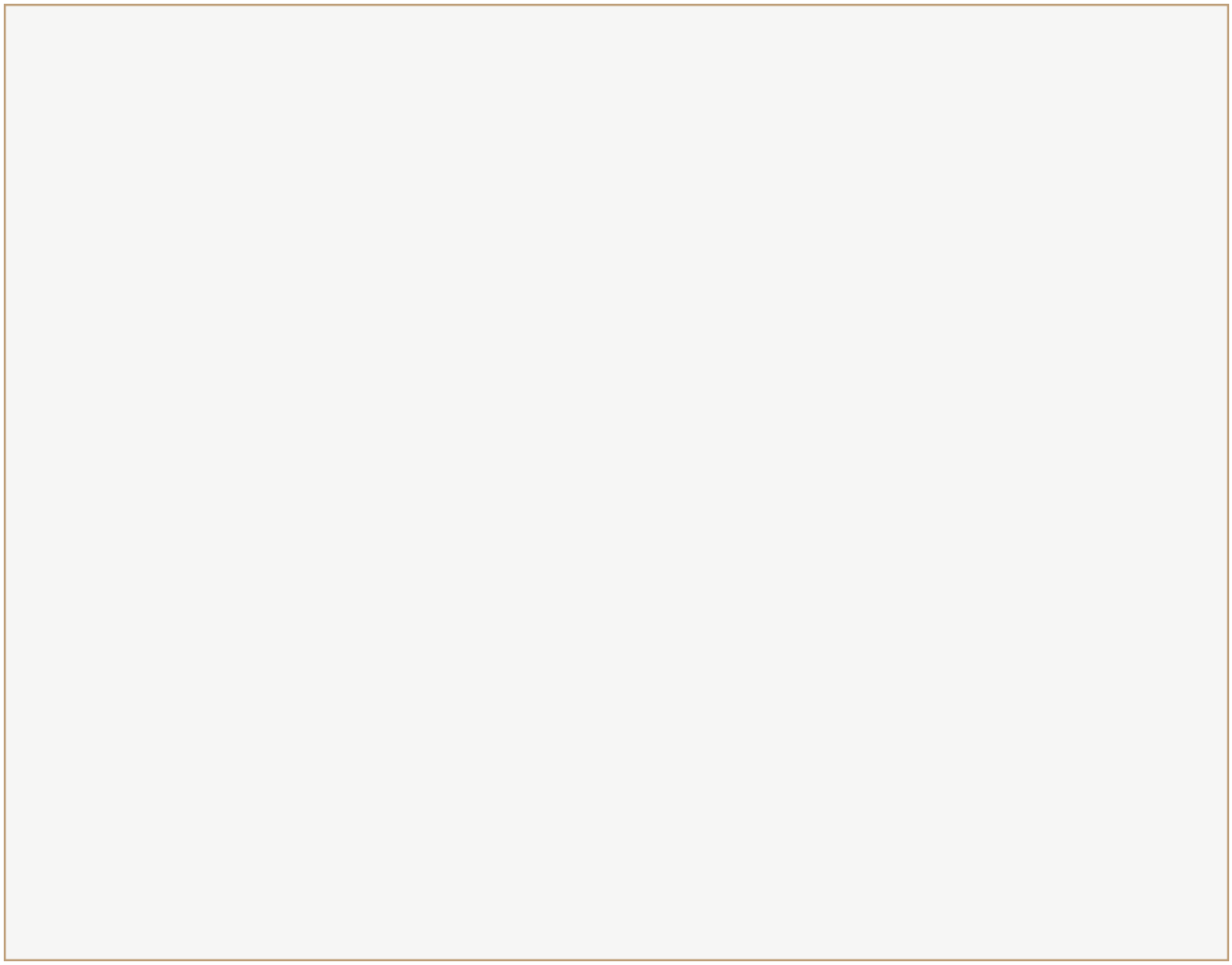
- Administrative Calendar Routine
- EXAMPLE:
  - Mondays: Team calls (Core team, contractors, focus groups for programs/live event planning, monthly coaches calls)
  - Monthly check-ins with teams
  - Creative Days: (media creation, podcast, email nurture creation, new programs, etc)

MARKETING MAP

Now that you have your sales conversion plan in place time to reverse engineer how you will market each into your funnel

DAY 3: FINE TUNE YOUR PLAN

FINE TUNE YOUR PLAN

CHECKLIST:

- Fine tune and organize how you will report to your team
- The why and how they are a part of the big picture along with the vision mission of the year (how their work aligns to the overall goals)
- Financial Plan
- Marketing Plan
- KPIs for how your team will report in on their work that contributes to the company annual goal