

www.healthyjoyfulliving.com

Business Plan E-Workbook

by **Suzanne Saxe-Roux Ed.D.**



twitter.com/suzannesaxeroux
[linkedin.com/in/suzannesaxeroux](https://www.linkedin.com/in/suzannesaxeroux)
[facebook.com/healthyjoyfulliving](https://www.facebook.com/healthyjoyfulliving)

NOTICE: You Do NOT Have the Right to Reprint, Give Away or Resell this E-Book!

If you obtained this e-book from anywhere other than a download from the [Healthy Joyful Living](http://HealthyJoyfulLiving.com) website, you have a pirated copy.

Please help stop Internet crime by reporting this to:

<mailto:suzanne@saxe-roux.com>

©2010 Copyright, ISBN: 978-0-9826909-2-5
Suzanne Saxe-Roux, Healthy Joyful Living

ALL RIGHTS RESERVED. No part of this e-book may be reproduced or transmitted in any form to include electronic, copying, reproduction, or any other form, without express written, dated and signed permission from the author.

DISCLAIMER AND/OR LEGAL NOTICES:

The information presented herein represents the view of the author as of the date of publication. The author reserves the right to update this document at any time based on new information obtained.

The workbook is for the purpose of instruction and the documents that are developed for the purpose of growing a business or creating a lifestyle are solely the responsibility of the creator. The author of this instructional workbook or affiliates/partners is responsible for errors, inaccuracies, omissions in this document or in the creators customized business-lifestyle plan. If advice concerning legal or related matters is needed, the services of a fully qualified professional should be sought. All examples provided are for instructional purposes only. This e-book is not intended for use as a source of legal or accounting advice. You should be aware of any laws which govern business transactions or other business practices in your country and state.

Introduction

Business Plan E-Book

Congratulations, you are on your way to designing and moving forward with creating a balanced integrated life that includes building a successful business and living the lifestyle you desire.

This Seven Step Process for developing your business and lifestyle plan is based on the best practices in a variety of disciplines and will allow you to create the healthy joyful balanced and successful life you deserve.

The Business Plan E-Book will guide you through a business assessment and creating your vision, mission, 5 courageous goals and outcomes, target market, brand, strategies and actions for the next year.

Simultaneously, we suggest you work through the development of your **Lifestyle Plan** to build a balanced and successful life.

The Lifestyle Plan E-Book is based on a similar framework enabling you to gain a full perspective of your current situation, your history and story, and how you see your lifestyle now supporting your dreams, desires, and needs as well as the business you are building.

Through this E-Book, we will guide you in the steps you need to take to create a simple, easy-to-use two page business-life plan. Additional coaching is available by emailing us at Suzanne@saxe-roux.com

Materials Needed: *Business Plan Workbook*. You may choose to complete the workbook by typing in your answers on the pdf or print it and put your creativity into your plan with color felt pens, a journal, and small sticky notes.

Directions: Use color pens (or color as you type) to represent the different feelings you have about certain aspects of your life. Highlight boldly in red, yellow, or green. Draw pictures to represent ideas. Use sticky notes to organize your thoughts and move them around. Use your journal for more space to explore specific areas.

This is an exciting time in your life and we are thrilled to be supporting you in this journey.

Best,

Suzanne Saxe-Roux, Ed.D.
www.healthyjoyfulliving.com

Business – Lifestyle Plan Framework

Creating a Life that has room for all your dreams

Business Plan	Lifestyle Plan
<p>Vision</p> <p>What are you Building?</p>	<p>Vision</p> <p>What are you Creating for yourself and your family in terms of the way you want to live your life and fulfill your dreams? Is there a family vision?</p>
<p>Mission and Purpose</p> <p>Why does your Business Exist? How does it reflect you, your personality, dreams, interests, wishes?</p>	<p>Mission and Purpose</p> <p>What is your purpose for your life? For some it is about their work or has become that by default, but for many of us with families it is broader. It also might be about your creative side, your human side, your love of something you want to share with the world.</p>
<p>5 Courageous Goals and Outcomes</p> <p>Business related, but linked to your life vision as well.</p>	<p>5 Courageous Goals and Outcomes</p> <p>What are the 5 courageous outcomes you want to achieve that will lead you towards creating the lifestyle you desire and what is the timeframe in which you want to achieve them?</p>
<p>Audience and Target Markets</p> <p>What does your target market look like; do for fun, for work? What do they care about? What are their pains, problems, and challenges?</p>	<p>Target Relationships</p> <p>Who is included in living the life you desire? Who are you focusing on and to what degree? Family, kids, elderly parents, friends, colleagues?</p>
<p>Your Brand – Your Unique Gifts</p> <p>What are your unique gifts that you can offer to your customers? Where do your passions, your expertise, and your interests intersect?</p> <p>Does your “professional brand” align with who you are and want to be as a person?</p>	<p>You as a Total Person</p> <p>Who do you want to be and how do you want to be with those in your life? What interests do you have that you want to explore? What do you want people to say about you, how you have lived your life, and how you have achieved your dreams? Does your “professional brand” align with who you are and want to be as a person?</p>
<p>Business Strategies</p> <p>What strategies are needed in order to achieve your lifestyle vision? What are the key strategies that will help you to achieve your goals and that are aligned with your lifestyle goals?</p>	<p>Lifestyle Strategies</p> <p>What strategies are needed in order to achieve your lifestyle vision? What are the key strategies that will help you to attain this vision in the following areas: Relationships, business/career, environment (place), spiritual, lifelong learning, financial, leisure, and health.</p>
<p>Actions</p> <p>What are the key action steps that need to happen to move you forward to achieve each goal? List them as SMART steps (specific, measurable, achievable, realistic, and with a timeframe). List 5 key action steps for each major strategy that will move you forward in the timeframe you set.</p> <p>Make sure they are in alignment and support the time and energy needed to complete lifestyle actions as well.</p>	<p>Action Steps</p> <p>What are the key action steps that need to happen to move you forward to achieve each goal? List them as SMART steps (specific, measurable, achievable, realistic, and with a timeframe). List 5 key action steps for each major goal that will move you forward in the timeframe you set.</p> <p>Make sure they are in alignment and support the time and energy needed to complete the business actions.</p>

The Business Plan Workbook

The Business Plan



Business Assessment

To get started it is valuable to take a few minutes and reflect on where you have been and how satisfied you are at this time in your business and in your life. This part of your business plan focuses on the business itself. When you work through The Lifestyle Plan you will have an opportunity to assess the rest of your life and how satisfied you are.

Rate yourself on how satisfied you are with the following areas in your business

Are there areas that you want to change in terms of focus, energy, and results?

As you rate yourself from 0- Not at all Satisfied to 10-Totally Satisfied, write down what the key issue might be: people, process, time, willingness, finances, external factors beyond your control.

Time Spent	How Satisfied are you with the Results in the following areas?	Key Issue People Process Time Willingness Finances External
	0 1 2 3 4 5 6 7 8 9 10	
Attaining new clients		
Marketing – attracting new clients and keeping old ones interested		
Business Development and Sales – Revenues, new client acquisition, growing current client revenue		
Partnerships and Alliances Leveraging partners for increased marketing and sales		
Service Delivery - customer satisfaction and ease		

Public relations - speaking, articles, social marketing		
Products - Product development for increased revenue, new products, Product revisions, packaging of products		
Operations - Delivery of services and products		
Administrative		
Commuting and Business Travel		
Professional Development		
Achievement of Goals		
Profitability and Cash flow		
Corporate Responsibility and Giving		
Balanced Life		
Level of Motivation		
Team Members -employees, subcontractors		
Leadership		
Other		

Overall, what is no Longer Working?

List the top 3 areas that you need to focus on in the next year.

1.

2.

3.

List the top 3 areas that you want to focus on in the next year?

1.

2.

3.

Are they the same? If not, figure out which ones you both **need and also want** to focus on.

What are your Must Do's this next year to achieve your Dream!

1.

2.

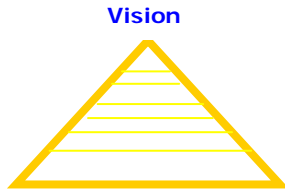
3.

Additional Comments:

If we don't change direction soon, we'll end up where we are going.
Professor Irwin Corey, American comedian, satirist and pantomimist (1914-)

NOTES:

Building the Plan



Your Vision

Knowing where you are going in both your business and your life are critical to success and to keeping you and others motivated along the way.

Your vision statement is your inspiration and your future. It is the focus of what you want to build. For now we will look at it in terms of your business. The complimentary part is what are you building in your life?

Vision Statements

Answer the following questions:

- What do you want your company to become in the future?
- Who are the target markets and where do they live and work?
- What are the unique key products and services you offer?
- What are the growth plans in terms of revenue, size, reach?

Taking the time to be able to simply state your vision will provide you and your team with invaluable inspiration and motivation to achieve your goals in the future.

To craft your vision statement, answer the above questions alone or have a coach, consultant, or colleague discuss with you.

Vision Statement Template

Use the following template to create your vision statement. It won't be perfect right away, but after a few edits and discussions with your team and supporters, you will have a terrific vision statement to inspire you to success.

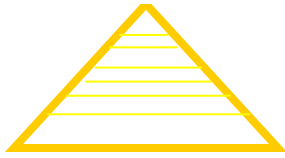
Vision Statement	
_____ will be the premier provider of <i>(company name and type of business)</i>	
(Products and Services)	
Serving _____ <i>(target markets, geography)</i>	
Using _____ <i>(how products and services will be provided)</i>	
Within _____, <i>(timeframe)</i>	_____ will be achieving <i>(company name)</i>
_____ and _____ <i>(Revenues)</i>	_____ <i>(Profitability)</i>
With a team of _____ <i>(Number of employees, subcontractors, partners, affiliates)</i>	

Example:

Business Consulting, Inc. will be the premier provider of products and services for creating successful businesses for women entrepreneurs who are providing services and information products. Products and Services will be provided 80% via the internet with premium products via the phone and in-person. In the next 3 years, Business Consulting, Inc. will be achieving \$500,000 and 80% profitability with a small team of subcontractors, partners, and affiliates.

NOTES:

Mission



Mission and Purpose

What is the reason your business exists? Why are you spending energy, time, money, and your creativity building this business? Great mission statements explain why your business, your products, and your unique offerings exist. The fewer words the better.

As an example, Fed Ex's mission statement is to provide logistics, transportation and information services, much different than you might first think. A mission statement provides affinity to your customers and will direct you in your decision making.

Different than a vision, the mission, answers the questions "what are we providing and who are we providing it for?"

Mission Statements answer the following questions:

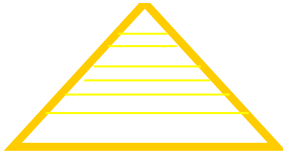
- Why does your business exist?
- What are you promising our customers?
- What contribution are you making to solving our customers' problems and needs or helping them to achieve their dreams and desires?

Taking the time to be able to simply state your mission will provide you and your team with invaluable inspiration and motivation to achieve your goals in the future.

To craft your mission statement, answer the following statements by filling in the grid on the next page.

NOTES:

5 Courageous Goals and Outcomes



5 Courageous Goals and Outcomes

Goals and outcomes are succinct statements that tell you what you want to do, how you are going to do it, and most importantly how you will know you are successful. The easiest way to write a courageous goal is to use the SMART analogy

- **Specific** (make it clear so anyone can understand what you are trying to accomplish)
- **Measureable** (will you know it when you see it)
- **Achievable** (can it be done in the time you desire)
- **Realistic** (based on the resources you have available is it doable?)
- **Time-bound** (is there a time line to the goal)

Your 5 Courageous Goals and Outcomes should help to direct you and your team's work and achieve success. If new ideas come up, you weigh them against the goals and decide to move forward, revise, or postpone based on your original goals.

One way to think about the **5 courageous goals** is to consider writing one in each of the following categories:

- Products and Services
- Marketing and Social Marketing
- Business Development and Sales
- Operations
- Professional Development

*All our dreams can come true
-- if we have the courage to pursue them.
-- Walt Disney (1901-1966)*

Writing your 5 Courageous Goals and Outcomes

Specific Action to be taken

How will you measure it?

Is it *Achievable* and *Realistic*?

If so, what is the timeframe?

Examples

Increase revenues on products sold through the internet from \$10,000 per month to \$25,000 per month in the next year.

Develop 3 new products to be sold to current and future clients that will be sold via the internet by the end of the year.

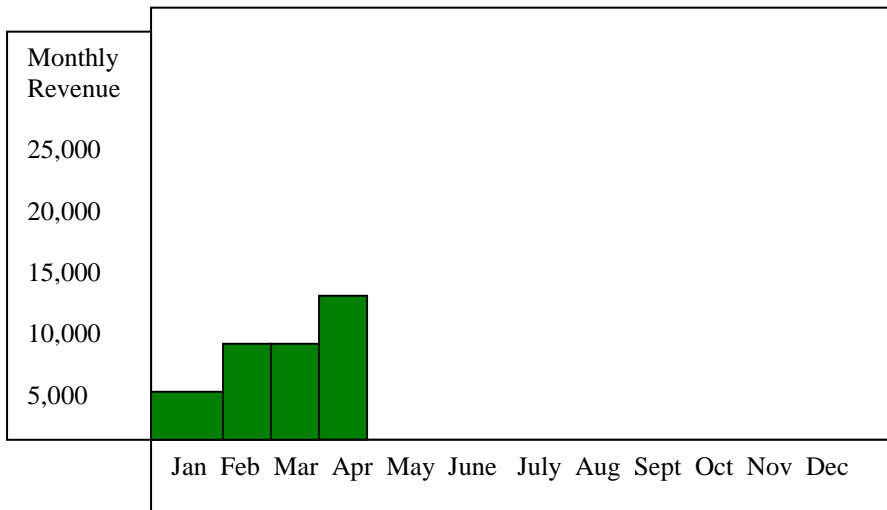
Book and deliver 6 public speaking engagements being paid \$5,000 per engagement by the end of the year.

Revise the website to include new shopping cart that integrates with bookkeeping by mid-year.

Publish book and implement PR and marketing strategy to sell 5,000 books this year.

Progress Checks

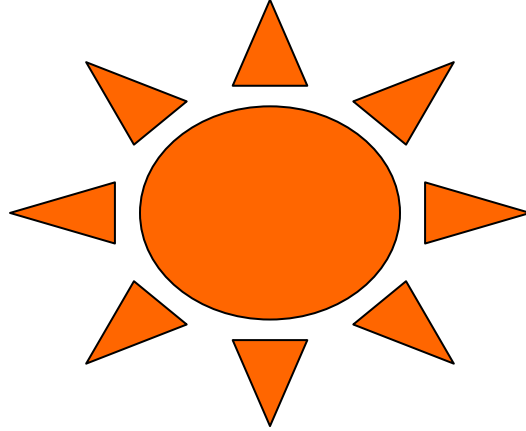
Deciding on a way to measure progress is critical to keeping you motivated. Can you create a chart or graph to illustrate progress? Start simple by creating a graph to show your progress. Monitor it monthly to see how far you have come and reward yourself for your progress.



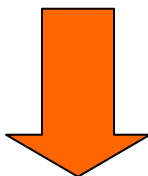
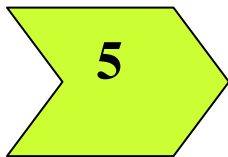
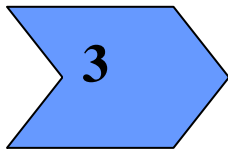
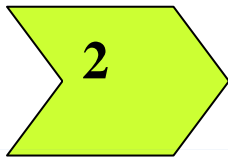
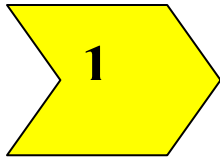
On the following page, write out your vision, mission, and 5 courageous goals and outcomes.

Your Vision

Mission



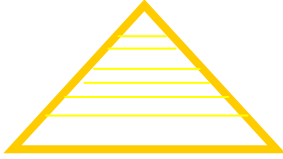
Five Courageous Goals and Outcomes



*Bon Courage-
Go with Courage*

NOTES

Target Markets



Target Markets

As part of your business plan, review and understand who your target market is. You might have a specific niche, such as the financial industry or lawyers, but one key to success is to become extremely clear on who your target market is, their likes, dislikes, behaviors, needs and desires.

In developing your target market, ask yourself the following questions:

1. How would you describe them?
2. Where can you find them?
3. Where do they hang out and with whom?
4. What are their likes, dislikes, behaviors, needs, and dreams?
5. What are their pains and problems and can you help to solve them?
6. How do they access information?
7. What are their buying patterns and behaviors? Are they changing?
8. How can you save them time, money, and headaches or help them to achieve their goals?

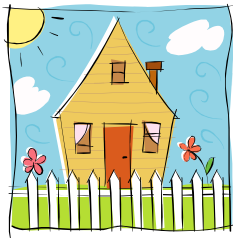
How we spend our days is, of course, how we spend our lives.

Annie Dillard, Pulitzer prize-winning American author (1934-)

Target Markets



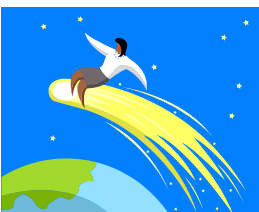
Places they Go, Work, Play, Shop, Hangout



**Likes/ dislikes, Preferences, Buying
Patterns and Behaviors, Needs, Pains,**



Dreams, Hopes, Wishes



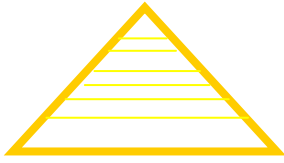
Target Markets (Cont'd)

**What business or personal problem are you solving?
What dream, wish, hopes are you helping them to achieve?**



Why do you want to focus on this target market? What is the win for you?

NOTES:



Your Brand, Unique Gifts and Expertise

In building a successful business it is important to distinguish yourself from the competition. For most of us, the land of opportunity is also full of other businesses like ourselves. The key to your success is to understand what your competition offers and more importantly to determine and cultivate your unique brand and your unique gifts and offerings. This is especially true in the land of professional services where the distinguishing factors are seen in your brand and your gifts as a solopreneur or as a business.

In refreshing, reviewing or developing your brand and unique gifts, consider who YOU are and who Your Company is.

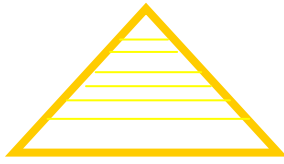
- Age / Generation
- Gender
- Life Experience
- Professional Background
- Education
- Relationships or Community
- Family Structure
- View of the world
- Cultural Identity / Home Location
- Personal Struggles & Triumphs
- Personal Interests

How do you want to show up to the world as a business person and company?

- Traditional, Entrepreneurial, Ageless, Worldly, Sophisticated, Avant Garde, Creative, Cutting Edge, Full Service.
- Fun, humorous, light, easy to work with, makes you smile.
- Thought-provoking, emotionally charged, focused on meaning.
- Educate and train for self and professional improvement.
- Provide new Information, Save Them Time, Money or Effort.
- Inspirational - Move Others to Take Action, Move others to live their dreams, to accomplish great feats.

NOTES:

Strategies



Strategies

Strategies define what will make your business successful over time and how you will achieve your courageous goals. Strategies set the direction, follow a philosophy, and focus the efforts of everyone to achieve the desired outcomes.

Taking the time to both think strategically and define your **strategies** will provide you with:

- A clear direction to achieve your desired results.
- A model for how you want to do business, build products, sell, market, and run your business.
- A benchmark for which all decisions are based.
- A big picture view of where you are heading and how you are going to get there.

Deciding on the **strategies** to use for your business often coincides with your business lifecycle. For businesses in their first year, you may need to focus your strategies on client acquisition and becoming known in the marketplace. In year two-three you might find that operations need to be improved, product development needs attention, and marketing needs to be front and center.

Most importantly your **strategies** are to support you achieving your **5 courageous goals and outcomes**. In deciding what strategies might be appropriate, complete the SWOT (strengths, weaknesses, opportunity, and threats) analysis below and brainstorm with others on the best strategy to take to achieve your goals

SWOT Analysis

Many companies complete a SWOT analysis as they are developing their strategies. This stands for Strengths, Weaknesses, Opportunities and Threats.

Use the following chart to complete your SWOT analysis.

Internally Focused	Strengths What are your strengths as individuals and a company?	Opportunities What opportunities can you take advantage of using your strengths?
	Weaknesses What are the weaknesses you are facing in terms of operations, sales, marketing, products, services, revenues?	Threats What are the external threats and challenges you need to be aware of?

Based on your SWOT analysis, what are some key strategies that will enable you to achieve your 5 Courageous Goals and Outcomes.

Writing Your Strategies

In writing your strategies, use the following format as a guide.

Business Activity

Result you want to Achieve

Process to Accomplish objective

Examples of Strategies

Business Consulting

1. Publish book to be established as expert in the field.
2. Attract clients in target market who have business problems to be solved.
3. Increase revenues by 30% through online products and solution selling.
4. Increase presence on social networking sites.
5. Develop new partnerships with complementary products.

Health Educator

1. Build training products to offer clients.
2. Build out website to attract customers.
3. Market to clients using newsletter and blog.
4. Focus on twitter, facebook, and linkedin for social networking.
5. Increase revenues by 20% in six months.

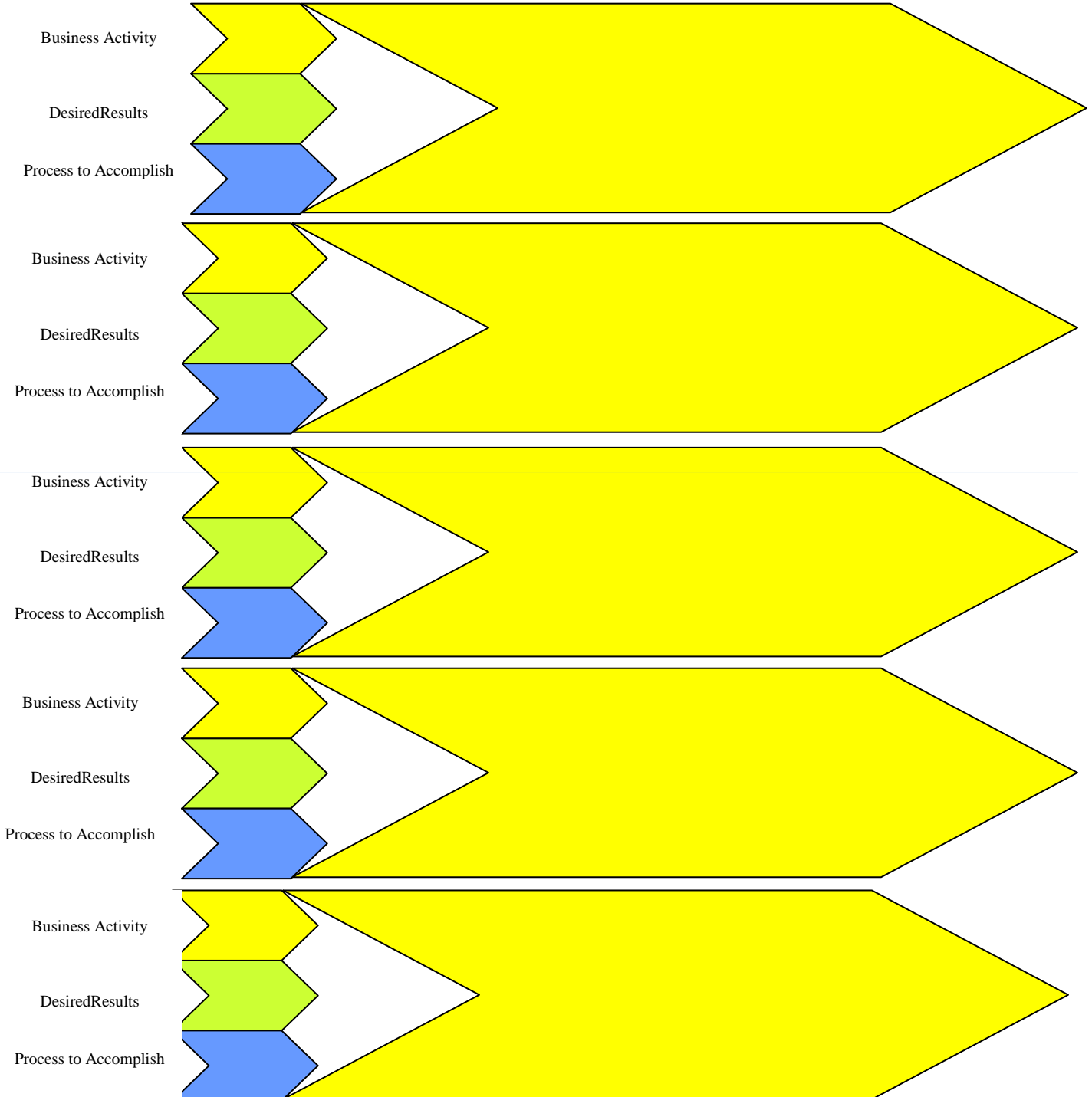
Key Words to get you started in creating your strategies

Starters	Marketing	Sells	Products/Services	Operations
Become	Attract/Obtain	Increase	Coach	Improve
Focus on	Speak	Business Development	Consult	Build
Develop	Promote	Provide solutions	Publish	Streamline
Generate	Social market	Generate	Write	Use
Build	Social network	Price	Develop	Re-engineer
Organize	Partner with	Skill Development	Implement	Process
Strategically Align	Public Relations	Measure	Create	Customer Service

Writing Your Strategies

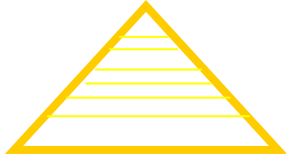
Business Activity
Result you want to Achieve
Process to Accomplish objective

Strategies



NOTES:

Action Plans



Action Plans

Action Plans are defined as the steps you need to take to accomplish a goal. The specific activities that need to occur that will ultimately result in your achieving your desired outcomes.

The execution of your **goals and strategies** is visible within the **action plans**. Each action plan relates to one of your **5 Courageous Goals and Outcomes** and your **Strategies**.

To ensure that you will stay focused on what is most important, it is critical to limit your action plans to the priority outcomes, keeping in mind that the resources and funding must be available to complete the plan.

Step 1 is to decide which Goals and Strategies are most important to focus on for each quarter and ensure there are resources and funding to support this action plan.

You may decide you have a focus for the quarter or the year (i.e. improving infrastructure) and focus your action plans all in one direction to meet one specific outcome. Or you might choose to focus on 2 or 3 strategies and subsequent action plans for the entire year in parallel.

Action Plan Commitments

Describe the work to be done
Verb+Noun

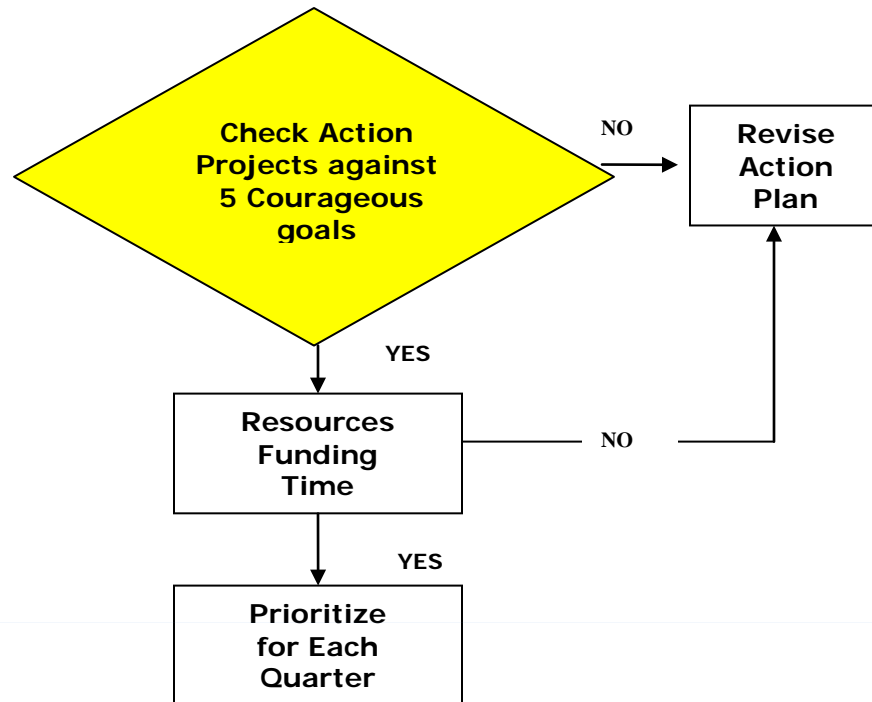
Date of Completion

Examples of Action Plan Commitments

- Complete book on leadership by June 1 and self-published by August 1.
- Implement new online sales tool with entire team by April 1.
- Develop new website with shopping cart and store by August 1.
- Design, develop, pilot new training program with 3 clients by Sept 1.
- Create and rollout marketing strategy for new training program by Oct 1.

Priorities, Resources, and Funding

Before finalizing the project plans, check them against the **5 Courageous Goals and Outcomes**, ensure that you can obtain resources, time, and funding, and assign them to quarterly goals.



Next Steps in Action Planning

1. **Establish the resources** to be used and have them involved in the development of the action plan
2. **Ensure funding and budgets** are available to do what needs to be done.
3. **Build realistic timeframes** into the plan. If speed is of the essence, marshal some additional resources and increase your budget.
4. **Prioritize the Action Plans per quarter.** This is especially critical if you personally are involved in leading and completing the action items. Be aware of overestimating how much time you will have available to spend on the project, based on everything else you are responsible for in your business.





Finalize Your Plan




Take the following steps to finalize your plan and one that you are excited to be working with over the next year.

1. Get feedback from others, a coach, a life partner, a friend, team members. Choose people who have a stake in you being successful, and will push and support you at the same time. Ask your reviewers:
 - Are the 5 Courageous Goals and Outcomes audacious and yet realistic?
 - Is it a stretch, but also possible?
 - Are there any major obstacles to achieving the goals you need to consider?
 - What have you forgotten or just didn't want to deal with?
2. Check each outcome, strategy and plan for measures of success. Ask yourself what success truly is and can you measure it.
3. Make sure that the business plan supports and aligns with your lifestyle plan. If not, make adjustments as needed on both plans.
4. Revise the plan and send it for review once again. You are the one who has to ultimately live with the business plan, but another pair of eyes will help to ensure you are on track.
5. Finalize the plan so it fits on one page in the template form. Feel free to use abbreviations, bullets, symbols and shorthand.








Business Plan

The Business

<p>Vision</p> 	<p>What do you dream and desire your business be doing, achieving, providing in the next 3-5 years?</p>
<p>Mission</p> 	<p>What is the purpose of your business? Why does it exist?</p>
<p>5 Courageous Goals and Outcomes</p> 	<p>Outcomes = Measurable Results What are your 5 Courageous Goals and Desired Outcomes that will provide the desired results?</p>
<p>Target Markets</p> 	<p>Who is your target market (be specific)</p>

<p>Your Brand</p> 	<p>What Makes YOU and YOUR company uniquely different?</p>
<p>Strategies</p> 	<p>How will you go about achieving your outcomes? What will your business focus on over the next year?</p>
<p>Action Plans</p> 	<p>What projects must be completed to implement the strategies and achieve results?</p>

Example Business Plan The Business

<p>Vision</p> 	<p>Within the next 3 years grow ABC CONSULTING into a \$MILLION GLOBAL INTERNET PRODUCT BUSINESS providing PRODUCTS FOR Women Entrepreneurs</p>
<p>Mission</p> 	<p>Supporting women Entrepreneurs in building and leading successful businesses</p>
<p>5 Courageous Goals and Outcomes</p> 	<ol style="list-style-type: none"> 1. Sales (Annual Dollar Volume) from products and services to \$300,000. 2. Write and publish book. 3. Deliver Regularly scheduled Blog Talk Radio shows and You Tube videos. 4. Turn website into store marketing other services and products. 5. Develop online products that are raved about and sold to millions.
<p>Target Markets</p> 	<ul style="list-style-type: none"> • Women Entrepreneurs • Provide Services • Want to live balanced life • Usually solo-preneur or small team • Using own resources for capital • Have credibility in their field
<p>Your Brand</p> 	<p>Entrepreneurial and Leadership Consulting and Coaching for Professional Women who have left Corporate America.</p>
<p>Strategies</p> 	<ul style="list-style-type: none"> • Target Women Executives to Coach within companies. • Promote business by social marketing, Sponsorships, blog Talk Radio, You tube, blogging, articles, speaking. • Positioning: Become nationally known for accelerating Business performance and the start-up phase. • Revenue Model: Generate revenues by Selling Online products, recurring revenue (mastermind type groups), Book, sponsorships. • Use Strategic Partners to add more products to website to sell and get revenues. Build partnerships to receive some referral revenue, group teleseminars for selling VIP products.
<p>Action Plans</p> 	<ul style="list-style-type: none"> • Project 1: Build Products to sell online. • Project 2: Blog Talk Radio and You Tube videos. • Project 3: Book Project – self-publishing – marketing plan for book and Sponsors for Book. • Project 4: Make Website more interactive with new things to add, Add STORE – products to sell. Guest bloggers and sponsors. • Project 5: Increase Twitter, and other Social Marketing connections for marketing book and services. • Project 6: Increase Newsletter list.

CONSULTING PROVIDED IN DEVELOPING YOUR BUSINESS–LIFESTYLE PLAN

Consulting and Facilitation

The Two Page Business and Life Plan is available to you via one-on-one consulting, in a workshop or webinar format or as part of our team and strategic planning sessions. Experienced consultants will work with you to build a powerful plan for your business and life.

Contact Us at www.healthyjoyfulliving.com or email Suzanne@saxe-roux.com

We look forward to helping you create your best business and life.

The Two-Page Business-Life Plan and e-book is copyrighted by Suzanne Saxe-Roux, Healthy Joyful Living 2010. No parts may be copied or distributed without permission.