

**Phenomenal Financial Blast Series with Ellen Rohr**

Congratulations!

You’ve committed to your success as a business owner and financial manager! The Phenomenal Profits webinar series is an awesome way to fast-track your progress. We will meet LIVE every Tuesday at 9 am central time for one hour content and assignments. Then, I’ll stay on the line for YOUR questions, success stories and challenges. I am here to help you handle the money, honey, so you can make more of it!

Throughout the series, there are benchmark accomplishments for you to achieve. This checklist will help you understand the scope of the program, and acknowledge your progress!

Sign and date as you complete these items…

* \_\_\_\_\_\_\_\_Put the dates of the Phenomenal Profits webinars on the calendar.
* \_\_\_\_\_\_\_\_Reviewed this Phenomenal Financial Checklist, and the Financial Basics folder of files.
* \_\_\_\_\_\_\_\_Submitted my tax returns for all years, including the most recent year.
* \_\_\_\_\_\_\_\_Met with my “Bean Team” to review my Balance Sheet and Profit & Loss, account by account.
* \_\_\_\_\_\_\_\_Determined software needs and upgrades required.
  + Date of new software launch: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_Replaced, promoted members of the Bean Team as needed.
* \_\_\_\_\_\_\_\_Committed to a weekly Financial Meeting with my bookkeeper, controller and myself as financial manager. The standing date is on the calendar. We have successfully met 3 weeks in a row, and have established this as habit.
  + Day and Time of weekly Financial Meeting: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_Read “Where Did the Money Go?” – BONUS! Have Bean Team members read it, too.
* \_\_\_\_\_\_\_\_Audited your financials, and created a list of accounts that need to be adjusted, deleted or merged.
* \_\_\_\_\_\_\_\_Scheduled meeting times to drill down and explore “weird” stuff on the audit list.
* \_\_\_\_\_\_\_\_Arranged for your CPA/accountant to check your work and verify that your financials are at KFP – Known Financial Position.
* \_\_\_\_\_\_\_\_Read “How Much Should I Charge?”
* \_\_\_\_\_\_\_\_Created a first draft Budget for 12 months.
* \_\_\_\_\_\_\_\_Started assembling the FQC – Financial Quick Check – to review at the weekly Financial Meeting.
* \_\_\_\_\_\_\_\_We have successfully reviewed the FQC on a weekly basis for 3 weeks.
* \_\_\_\_\_\_\_\_Established a Selling Price.
  + Selling price per \_\_\_\_\_\_ is \_\_\_\_\_\_\_\_\_
* \_\_\_\_\_\_\_\_Set a date to review Budget and Selling Price in 3 months.
* \_\_\_\_\_\_\_\_Reviewed financials and Selling Price calculations with our team.
* \_\_\_\_\_\_\_\_Updated our Pricing system/Price Book and/or Price Worksheet, focusing on “Sweet Spot” jobs/products.
* \_\_\_\_\_\_\_\_Committed to formal Sales and communication training for our team.
  + We are using the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Sales process.
* \_\_\_\_\_\_\_\_Created a Sales Game and implemented Scorecards.
* \_\_\_\_\_\_\_\_We have successfully closed 3 months, using our customized Month End Checklist.
* \_\_\_\_\_\_\_\_Updated my Business Planning system, and set a date for the next update.
* \_\_\_\_\_\_\_\_Reported in to Ellen and Howard! Via email, facebook or twitter. We love video reports, too. Tell us about your successes!

Xo$ **Ellen Rohr**

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