

# THE HOWARD PARTRIDGE "SIMPLE DIMPLE" BUSINESS PLAN

NAME \_\_\_\_\_

TODAY'S DATE \_\_\_\_\_

BUSINESS PLAN FOR YEAR \_\_\_\_\_

1. **DISC PROFILE** \_\_\_\_\_ (put your DISC Profile letter combination here). You must know yourself to grow yourself. As you implement your plan, keep your profile in mind and build a team around you that will complete you.
2. **WHEEL OF LIFE EXERCISE** – On a scale of 1-10, rate each of the 7 areas of life by circling the number that best represents where you are right now. 1=Poor. 10=Phenomenal.



## 3. DREAMS AND GOALS

*Go through the Ziglar Goal Setting Process to determine your personal goals.*

**Remember, the ONE and ONLY reason your business exists is to help you achieve your L.I.F.E. Goals!**

**Attach your Dream List and Your Personal Goals to Your Business Plan here.**

**Transfer your Wheel Of Life rating to this sheet.**

## **4. BORN TO WIN BUSINESS ASSESSMENT**

*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, we utilize SEO, 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 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*

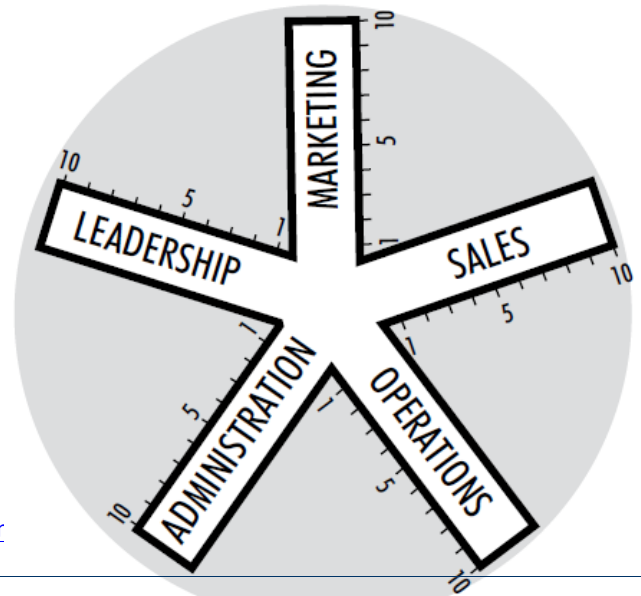
- We have effective project management processes in place
  - We have inventory management and office supplies/equipment processes in place
  - We have the latest, most effective equipment to deliver our unique service experience
- TOTAL ÷ 10= \_\_\_\_\_

#### 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 one sentence mission 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 position descriptions 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!

## 4. S.W.O.T. ANALYSIS

**Strengths of my business:**

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**Weaknesses of my business:**

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**Opportunities I need to take advantage of this year:**

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

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## 5. MY BUSINESS VISION FOR THIS YEAR

***Describe how you see your business being different this year:***

*Do Your 12 Month Budget and fill in "Thumbnail Budget" here.*

*Insert your 12 Month Budget into your binder.*

<b>MY 12 MONTH BUDGET</b>	\$ _____	Sales (All Revenue)
	- \$ _____	Cost of Services Sold (COGS)
	= \$ _____	Gross Profit (GP)
	- \$ _____	Fixed Expense (Overhead)
	= \$ _____	Net

**Staff Changes (if any):**

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**Equipment or Resources to Add:**

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

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**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"

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**OUR VALUES:** Create 3 to 5 Values that describe the standards you and your team must live by 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).

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**OUR PURPOSE:** Create a one sentence Purpose Statement that explains WHY your company matters to your community. Example:

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**ORGANIZATIONAL CHART - SHOULD BE** Put position titles and initials in each box

LEADERSHIP	MARKETING	SALES	OPERATIONS	ADMINISTRATION
DIRECTING (PLANNING)				
MANAGING (SUPERVISING)				
IMPLEMENTING (DOING)				

## 6. PRDs – PERFORMANCE RESULTS DESCRIPTIONS

*Create a PRD for each Position on the Organizational Chart.*

*(Insert PRD into binder)*

## 7. THE 7M MARKETING PLAN

**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)

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

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**Benefit of 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: (Areas of your industry that matter to the prospect)**

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**Benefits of Experience:** \_\_\_\_\_

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## 3. EDUCATION

**Training/Certifications:**

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**Other Education:** \_\_\_\_\_

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**Benefits of Education:** \_\_\_\_\_

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## 4. SYSTEMS

**What's Unique About Our Delivery:** \_\_\_\_\_

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**Define Steps/Processes:** \_\_\_\_\_

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**Benefits of Systems:** \_\_\_\_\_

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## 5. GUARANTEE

**Our Overall Guarantee:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**How You Handle Your Guarantee:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Benefit of Guarantee:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## 6. Marketing Methods

**Experiential Marketing** (What do you do to set yourself apart from your competitors)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **Referral Marketing**

List or attach your Referral Source List.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Describe your Referral Reward Program.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Client Base Marketing** (Describe your plan for calling, e-mailing and mailing to your client base)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Direct Advertising** (List any and all ads that you plan to place)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Direct Selling** (List or attach prospect list)

Internet Marketing (What changes need to be made on your website(s), blog(s), social media and SEO if any)

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

<u>Daily</u>	<u>Weekly</u>
	<p data-bbox="1117 1045 1234 1075"><u>Monthly</u></p>

## SPECIFIC MARKETING CAMPAIGNS

*Attach Marketing Campaigns that include:*

*List of Prospects or Clients*

*Date Campaign to Reach the List*

*Date Marketing Pieces to Be Ready*

*Date Campaign Outline Needs to Be Created*

**Example: Conference Mailer**

Date of Event: April 30<sup>th</sup> – May 2<sup>nd</sup>  
Date Mailer to Arrive: March 1<sup>st</sup>, 30<sup>th</sup> and April 16<sup>th</sup>  
Date Mailer to Be Mailed: Feb 27<sup>th</sup>, March 28<sup>th</sup> and April 14<sup>th</sup>  
Date Mailer to Be Ready: Feb 13<sup>th</sup>  
Date Mailer for Final Proof: Feb 1<sup>st</sup>  
Date Mailer to Be Created: January 15<sup>th</sup>

## PHENOMENAL FOUR PROJECTS (NEXT 90 DAYS)

*List the projects that will have the BIGGEST impact on your business in the next 90 days.  
(Review your Business Assessment and discuss with your coach for ideas)*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

## 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 Planner for that day.*

## INNER CIRCLE RESOURCES

*No one is phenomenally successful without inspiration, organization, training, and support.  
Use your resources!*

1. Inner Circle Home Study Course: Learn Howard's Foundational Teachings
2. Live Weekly Web Training with Howard: Learn the Systems, Ask Questions Live
3. Web Training Replay: Inner Circle Website Under Most Recent Webinars
4. Inner Circle Website: Online Training and Live Event Recordings
5. POD Calls: Stay Focused, Encouraged and Accountable
6. Quarterly One on One
7. E-Mail Support
8. Live Events: Learn from Top Business Trainers and Connect with the Community

## ADDITIONAL PROGRAMS AVAILABLE

- Soft Serve (Scheduling software for service companies)
- Infusionsoft (Sales and Marketing Management Software)
- Simple Dimple Website Builder (Basic Word Press site you can build on)
- Send Out Cards (Greeting Card system to build and maintain relationships)

- **Member Only Workshops (Smaller group learning for deeper learning)**
- **Systems Day with Santiago (go through the 5 business systems)**
- **777 Mastermind (Flesh out S.W.O.T. Analysis with Howard and Rick quarterly)**
- **787 Consulting (Howard and Santiago come to YOUR location and build your systems WITH you throughout the year)**