THE TOTAL EXPERIENCE

BUSINESS OUTLINE

The road map to …

(use this space to set a timeline or a big goal for yourself ie: *“the next 3 years”* or *“finding my bliss”*)

(as you fill in sections of this outline, feel free to delete all of the helpful guidance inside these (parentheses))

1. BUSINESS SUMMARY: (WAIT!!! This is tempting, but don’t start with this… start by reading through this whole outline and touching base with yourself in each category. Don’t worry about diving in too deep, just read through to get a sense of what this whole thing is about and then come back here to kick this whole thing off in a big way. Building a super strong business plan is about taking time to really think and be honest with yourself. It’ll all be worth it in the end!!!)

DREAM STATEMENT: (This is where you decide what you want your business to be for YOU. This is just for internal purposes and can be selfish. Set up happiness-based goals so you have something great to work toward! For example, part of your dream statement could just be to not have to worry so much. It’s really that simple and that important.)

* …

MISSION STATEMENT: (Do you have one? If not here’s a quick way to build a really good mission statement: what I sell + who I sell it to + how I sell it + empowering language to tie it all together = mission statement! It’s really not as intimidating as it sounds.)

* what I sell - …
* who I sell to - …
* how I sell it - …
* OFFICIAL MISSION STATEMENT: (Try not to get too caught up in this… It’s a BIG deal, but you’re probably going to come back to this throughout the whole business plan process and tweak things as you go.)
* …

VALUE PROPOSITION: (OK… what the heck is this…? This is going to be your new best friend. Your value proposition is what you use to explain to people why they should hire you. Think of this as your elevator pitch. Every networking event you go to, every sales conversation you find yourself in, every single time you ever talk about your business, this is going to be the thing you pull out of your pocket to give you the confidence you need to make the most of every opportunity)

* + MY FOCUS: (To kick off the process of building your value proposition, start by listing out all the categories of services you want to be your absolute focal point. Be concise, don’t worry about getting detailed until later sections)
* …
* …
* OFFICIAL VALUE PROPOSITION: (This is how you sell yourself. It’s entirely for potential customers and should focus on what makes you unique from your competitors. Talk directly to your target audience and be specific about why they should use you.)
* …

2. IDEAL CLIENT IDENTIFICATION: (Do you already have clients? Good!! Honestly either answer is great because the simple fact that you’re building a business plan means you’d moving in the right direction and *will* have clients at some point. So let’s plan this out!)

FILL THIS OUT IF YOU DO HAVE CLIENTS ALREADY (otherwise skip these three bullet points to the next three bullet points)

* BEST CLIENTS: (list the best people you’ve worked with and LOVED. People who you’d work with again in a heartbeat and want all of your future clients to be like.)
* …
* …
* BEST CLIENTS TRAITS: (Now go back through your list of best clients and list out what traits of theirs make you love them so much ie: they always pay on time, I look forward to meetings with them, they trust me, they appreciate me.)
* …
* …
* WHAT I HAVE DO TO FIND MORE OF THOSE?: (List the things you need to do to get more customers like those best ones. Where do you think you’ll find them? What would they want to see/hear from you?)
* …
* …

FILL THIS OUT IF YOU DON’T HAVE CLIENTS ALREADY

* WHO DO I WANT TO SELL TO?: (Think back to that “who I sell to” question. What was your answer? Who do you think your customer is going to be? You can think of real people who you know you want to sell to or you can think up fictional people who you want to look for when it’s time to sell. If you’re going the fictional route, try giving them real names, ages, jobs, habits. It can be really fun and *really* helpful!)
* …
* …
* WHAT I HAVE DO TO FIND THEM?: (So now that you have your list, fictional or real, try to think of how you’ll make the dream a reality. Where do you think you’ll find them? What would they want to see/hear from you? If they’re fictional, you can see how much easier this whole thing is if you’ve given them a little context ie. names, careers, habits, etc.)
* …
* …

BACK TO NORMAL! Pick back up here whether you have clients or not.

CLIENT ONBOARDING: (Once you’ve done the work to find all those great new customers… what are you planning to do with them? At Inkind Design this was *super important* because so much of what we do is all about kindness and we got to really lean into that with our onboarding process. To start, do you have contracts for new clients to sign? Do you send them any welcome gifts or thank-yous? How about a survey to collect all of their contact info? The possibilities are endless! If you need any inspiration, just Google “client onboarding” and see what you find!)

* …
* …

3. BRAND IDENTITY:

WHO I AM: (think about who you are personally and professionally. Who are you to your customers, who are you to your employees, think of your BEST qualities. If you think of anything negative, list what you WANT to be instead.)

* …
* …

HOW MY BRAIN WORKS: (this is definitely for your eyes only… This is a chance to be *super honest* about who you are and what you need to be the best you possible. Are you someone who needs peace and quiet to get work done? Are you an introvert who needs to balance networking with organized down time? Are you someone who gets caught in procrastination traps or loses track of time? Don’t worry, the more honest you can be, the more about you are to take this list and turn it into gold. By building business systems around our natural habits and needs, you’ll build a business that can withstand just about anything.)

* …
* …

WHAT IS MY BRAND?: (Big question, right? Ok, so start small. Go back through all of the hard work you just did before getting to this point in the outline. Use everything you know about yourself, everything you know about your business, and everything you know about your clients to think about what you brand is. Think of your brand as being what people say about your business when you’re not in the room. Still having trouble? This is really hard. Try visiting our [Kindness & Business](https://www.inkind-design.com/kindness-and-business) page on the Inkind Design website to walk through our Defining Your Brand exercise!)

* …

4. SERVICES AND PRICING: (This is where things get REALLY fun!!! This is where all this big thinking comes back down to earth and you get to actually start lining up the building blocks of your business!!!)

WHAT I SELL: (Sound familiar? Yeah! You’ve already started this! If you go back to section 1, you can start with what you listed when you were working on your mission statement. But this is where we get more specific. List out every service you offer, and feel free to be as specific as you want.)

* …
* …

PACKAGES: (Do you offer packages? It’s ok if you don’t! Packages can be a super handy way to give your clients more value for dollar, while also helping each of your individual sales to be even bigger and better. Think about all the services you just listed and see if you can see any fun ways they might fit together.)

* …
* …

PRICES: (Do you have established prices? If so list them all out here. If not, don’t worry, that’s what the next section is *all* about. And even if you do have prices to list, you might end up coming back here to change things up once you’ve completed the next section. Remember, you’re building something BIG!)

* …
* …

5. FINANCIAL GOALS: (No matter what your business is… at some point it has to be about money. And this is that point! This is about being practical, an even a little bit selfish. Throughout all of this, remember that running a successful business comes down to understanding what you really NEED.)

THE BIG PICTURE: (Do you have any sales history? If so, start by listing out every year you’ve been in business and what you profit and loss numbers were each year. Easy, right? If you don’t have any sales history, skip this section but keep this piece of the exercise in mind as the years go by. This is good stuff!)

* …
* …
* RECOGNIZING TRENDS: (Now, take a look at all the numbers you just listed and see if you notice any trends… )
* …
* DIGGING EVEN DEEPER: (Here’s where things get REALLY good… go back and run through the same exercise, but with each month of the last few years. Notice any trends now? Are some months bigger and busier than others? Are some months slower and less lucrative? List out how you plan to make the most of big months and what you want to do with the slow months ie. revisiting/updating your business plan, focusing on your family, setting up your social media plans for the year… the possibilities are endless!)
* …
* …

WHAT YOU NEED: (Whether or not you have any sales history… this is a REALLY important exercise and can be unbelievably empowering. This is where you figure out what you need to get out of your business.)

* HOUSEHOLD EXPENSES: (How much money do you spend in a year…? If you’re not someone who keeps detailed records of household expenses, do your best to estimate how much you spend on big categories ie. groceries, childcare, mortgage or rent, entertainment. Be generous and if you’re not sure, just round up. This is one of those better-safe-than-sorry moments. Basically… how much money do you/does your household need to thrive and have a *good* year.)
* …
* HOUSEHOLD INCOME: (This one should be a little easier. Combine all sources of income in your life that could cover those household expenses. Do you have a spouse? Include their income too.)
* …
* WHAT I NEED TO BRING HOME: (Now that you’ve done the heavy lifting, this one should be really simple, and possibly surprising!)
* Household Income – Household Expenses = What I Need to Bring Home

MAKING IT HAPPEN: (So when you look at that what-I-need-to-bring-home number… how does it make you feel? Overwhelmed? Terrified? Energized? Like maybe you finally have a goal to work toward? Don’t worry, no matter what you’re feeling, it’s GOOD. Knowing what you’re up against is half the battle. The other half is figuring out how you’ll get there. Start by going back to the previous section, “Services and Pricing”, and think about whether your prices should be higher. Maybe you could come up with some bigger and better packages that will encourage bigger paydays. Take this momentum and list out a few ways you’re going to hit big number and have a great year!)

* …
* …
* …

6. PHYSCAL PLANNING FOR THE COMING YEARS

BUDGETING FOR BUSINESS: (The last set of exercises dealt with a bunch of personal numbers, but this section is all business. So, what do you spend money on in your business? If you already know what your budget is for the coming year, list it here. If you don’t, don’t worry. We’ve got you covered. Walk through our [Defining Your Budget](https://www.inkind-design.com/kindness-and-business) exercise and we’ll walk you through the whole thing.)

* Estimated Revenue -
* Fixed Costs -
* Variable Costs -
* One-off Expenses -
* Estimated Profit -

THINGS WORTH SPENDING ON: (All businesses have expenses. The last question was about the day-to-day kind of expenses, but this is more about those big picture things that are worth reaching for. Would updating your laptop or some of your software help you to be better at running your business? How about that big conference you’ve always wanted to go to, but weren’t sure you could afford? List out all of those big-ticket items and how they would benefit your business.)

* Item … - Benefit …
* Item … - Benefit …
* Item … - Benefit …

* MAKING IT HAPPEN: (Now, here’s where those dreams get to come true! Well… sort of. Take a look at your budget and figure out how much you can spend this year on those big things. Then look at your list of big things and figure out which would give you the most bang for your buck, ie. how many of them will your budget allow and which ones will have the biggest, most positive impact on your business? Now, list out which ones you’re going to go for this year!)
* …

7. SOCIAL GOALS FOR THE COMING YEARS

AVAILABLE POINTS OF GROWTH/PARTNERSHIP/OUTSOURCING: (Life gets easier when we surround ourselves with good people. And that’s what this section is all about: good people and making life easier.)

* PEOPLE IN MY WHEELHOUSE: (For an accountant, it makes sense to be connected to great payroll people and great financial planners for two big reasons. 1. Having people you know you can reliably, and seamlessly, communicate and work with makes every job easier. 2. Professionals who are related to your industry interact with potential customers in different ways and in different settings than you do. Anyone who needs financial planning or a payroll company definitely also needs an accountant and making those connections means increasing your reach without having to do all the legwork. Literally everyone wins. So how about you? Who do you have in your wheelhouse now? Who could make your life easier?)
* …
* …
* …
* GROUPS TO JOIN/EVENTS TO ATTEND: (We spend so much time focusing on getting the work done, but the more we can get outside of the day-to-day of small business, the bigger our dreams, and our businesses, can grow. What big events are happening this year that you don’t want to miss? What networking groups could help you grow your customer list or just help you to feel less alone? There are so many great options available in every industry. Don’t limit yourself, do a google search and just write down everything that looks good!)
* …
* …
* …

8. MARKETING

WHERE I’VE BEEN: (Think back on everything you’ve ever done to market your business. Social media accounts (even if you never do anything with them), blogs you’ve written, postcards, slogans, mailings, everything.)

* …
* …
* …

WHERE I SHOULD GO: (Now, look back at your list above and stop thinking of what’s there as disparate bits and pieces. Start thinking of them as marketing assets. What can you do to make the most of them? How can you use them better? And what’s missing? List out all of the marketing assets you want to build, or build up, over the coming years.)

* …
* …
* …

9. WORKFLOW AND SCHEDULING

HOW MY BRAIN WORKS: (Remember, this business plan is your own safe space. You don’t ever have to share this with anyone. So… here’s another chance for introspection and real honesty… don’t worry, you’ll be glad you did this. Try to put into words how your brain works. Do you need peace and quiet while you’re sending emails? Do you need down time after big events? Do you operate better with a plan of action? List out anything you can think of that might be helpful. And don’t be scared, this will all make sense in a bit.)

* …
* …
* …

HOW I LIKE TO WORK: …and how to enable clients to let me work that way. (The last section was about how your brain works, this one is about how you work within the context of your business. Better yet, this is about how to structure your business so that IT works for YOU. Look back at the list above and think of ways you could change how your business operates so that being an introvert or a parent or a bit scatterbrained aren’t working against you. For example, as an introvert myself, I know I need to network, but it seriously drains my energy. Solution: I only make myself go to one networking event a month and the day (or days) after the event I allow myself the quiet, personal time I need to reenergize.

* …
* …
* …

MY SCHEDULE (WEEKLY): (What is your perfect week? No really, how much time would you spend working? What kinds of breaks would you take? Be realistic and set up how you actually want to live/work. Make time for yourself. You don’t have to work every minute of every day.)

* Monday:
* Tuesday:
* Wednesday:
* Thursday:
* Friday:
* Saturday:
* Sunday:

MY SCHEDULE (ANNUALLY): (What happens in your year? Look back at the trends you discovered in the “Financial Goals” section and think about what happens when and where you can budget time for the things that are most important to you. Protect your personal time. If you want to take ten weeks off in a year, do it! We all got into business for ourselves to live our best lives. Just make sure you go back and adjust your “Budgeting for Business” answers and adjust the numbers to reflect any time off.)

* …

10. CONTINUING EDUCATION

CONTINUING TO GROW: (There are so many great opportunities for growth out there and most of them are just a google search away. So what can you do to keep growing as a person or as a business owner? What podcasts should you be listening to? What books should you read? What online masterclasses have been calling your name? Make a list and set a goal. One podcast a day. One book a month. Whatever makes sense for you. This is just a way to keep all of this GREAT forward momentum going!!!)

* …
* …
* …