

Planning Considerations Worksheet

A worksheet to identify what areas of your business needs to have a plan created to increase efficiency and productivity to push you towards success.



Personal Planning.

I'm starting with personal planning because YOU are the center of your business. Starting with developing as a person, a leader, a friend, spouse, or parent, will flow into the success of your business.

Consider each of the following areas and identify 1-3 things you would like to improve in each area.

1. Spirit – connection with God, service to others
2. Soul – mental growth, self-care, emotional growth
3. Body – physical and health
4. Relationships – spouse
5. Relationships – Family
6. Relationships – friends and co-workers
7. Finances

8. Parenting

9. Marriage

10. Any other areas you can think of?

Business Planning.

Consider each of the following areas and identify 1-3 things you would like to improve in each area.

Operations Systems:

1. Managing Your Team
2. Systems and Operations (standard operating procedures, workflows, documenting *how* your business runs)
3. Project Management
4. Information Technology (IT)

Client Management:

- 5. Sales Process
- 6. Onboarding Process
- 7. Client Engagement
- 8. Client Retention

Sales & Marketing:

- 9. Pricing Structure
- 10. Telling our story
- 11. Advertising
- 12. Social Media Strategy

Finances:

13. Accounting System

14. Understanding Financial Reports & Their Implications on
Business