



PROJECTED SALES GROWTH OVER 5 YEARS

BUSINESS PLAN WHERE YOUR JOURNEY BEGINS



**The Upleveling Your Business
Fast Track Way**



Pillar 1: Planning

Describe the business you want to build in plain English:

What is your Mission?

What are the Core Values of your business?

What is the Culture you want to build in your business?



What are your top 5 Short-Term Needs (hint cashflow is usually on this list)?

Based on the above, what are the first 3 things you need to do?

What are your Long-Term Goals for this business?



Pillar 2: Marketing and Sales

For Marketing and Sales, I currently grade my business:

A+	A	A-	B+	B	B-	C	C-	D+	D	D-	F
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Sales:

How much do you need to sell?

Marketing:

Describe your Ideal Clients.



How will you get those clients in the door?

Marketing you are doing currently.

Marketing you want to do.

Your Marketing Plan: What are 3 marketing campaigns you commit to launch in the next 2 quarters?

Name 3 ways you can build marketing systems to help automate your marketing:



Pillar 3: Management

For Management, I currently grade my business:

A+	A	A-	B+	B	B-	C	C-	D+	D	D-	F
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Staffing:

Who do you need to hire in the next 4 quarters?

Who do you need to hire first?

What do you need to do to prepare to onboard the new employees properly?



Workflow:

How many workflows are built out in each Department?

What improvements would you like to see in the next year?

What needs to happen to make those improvements happen?

Systems:

What Systems are running smoothly in your business and are fully documented with policies, procedures, examples, templates, diagrams and videos? (Sales Systems, Marketing Systems, Financial Systems, etc.)

What will you do to improve your systems over the next 4 quarters?



Supporting Your Team with the Right Tools:

What tools will your team need to do a good job?

Do you need more space for your people or your inventory?

What furniture or equipment do you need to purchase or replace in the next 4 quarters?

How might you outsource some duties over the next 4 quarters?



Pillar 4: Financial Controls.

For Financial Controls, I currently grade my business:

A+	A	A-	B+	B	B-	C	C-	D+	D	D-	F
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

My financial controls team is made up of the following individuals to help me be a good money manager. (CPA, bookkeeper, billing clerk, etc)

Lag Metrics:

My business reviews:	currently	within 3 months	within 6 months
Monthly Balance Sheet	☐	☐	☐
Monthly Profit & Loss (P&L)	☐	☐	☐
Monthly Budget	☐	☐	☐
Budget Variance Report	☐	☐	☐
Accounts Payable Report	☐	☐	☐
Accounts Receivable Report	☐	☐	☐
Daily Posted Cash Report	☐	☐	☐

Lead Metrics:

Sales Report	☐	☐	☐
Pre-Sales Report	☐	☐	☐
Marketing Report: online	☐	☐	☐
Marketing Report: networking	☐	☐	☐
Marketing Report: calls	☐	☐	☐
Marketing Report: referrals	☐	☐	☐
Marketing Report: other	☐	☐	☐



Next Steps: Ways to Streamline

6 Week Boot Camps

Sometimes the best way to get it done is to enter a program that will hold you accountable.

Our **Hiring and Onboarding Boot Camp** guides members of your team on how to automate your hiring systems and build your Onboarding University in an engaging and streamlined fashion. This Boot Camp gives you over 250 documents, scripts examples and templates and supports your team with Office Hours twice a week.

Our **Workflows and Workloads Boot Camp** guides you and your team on how to build Workflows for every Department of your business. We then break down the time spent and enter it into our special Workloads Calculator to determine your Gross Profit Margin and guide you to Forecasting.

Systems Package

Equip your Team with Systems they need! From our Financial Systems Manual to our Sales Systems Manual we help you break down your different departments so you team can work in a more streamlined fashion and with greater clarity on what they need to work on!

Looking to Hire and need with what they will do? Our Staffing Packages will guide you through How to Hire, Onboard and Work with a variety of positions from Executive Assistants, Marketing Assistants, Marketing Coordinator, Client Happiness Coordinator and Client Engagement Specialist! Each comes with a 25+ page Policies and Procedures Manual, short videos, and plenty of examples and templates to help you get that person profitable ASAP!

Coaching Program

Every Business needs help with different things at different times. That is why our Coaching Program starts you off with a solid Plan and then allows you to work with the Coach that you need in that moment, From Marketing to Sales to Financial Controls we have your covered with one-on-one coaching while also helping you build your systems. You also have access to our Culture/ Management Coach, Systems Coach, Client Happiness Coach and even our Copywriter!

Visit: <https://www.UplevelingYourBusinessSystems.com> or email:
ClientEngagement@uplevelingyourbusiness.com

If you have any questions, we're available to help. Just text **SYSTEMS** to **(844) 403 - 2303** and we'll be happy to help you find the best choices for your business!