



LEVEL UP 2021

AN INTERACTIVE BUSINESS
PLANNING WORKSHOP

WORKBOOK



locked
& *lawyered*



2021 is your year.

I believe it is totally possible to have a business that you are head over heels in love with.

And I believe that you can build a business that is as fulfilling as it is profitable. It all starts with setting goals that are intentional and step-by-step actions to get you there.

This workbook is designed to help you get clear on what you really want and start taking steps to get there.

LEVEL UP 2021

PART ONE: LET'S GET CLEAR ON WHO YOU ARE, WHO YOU SERVE,
AND HOW YOU SERVE THEM.


Let's do this!



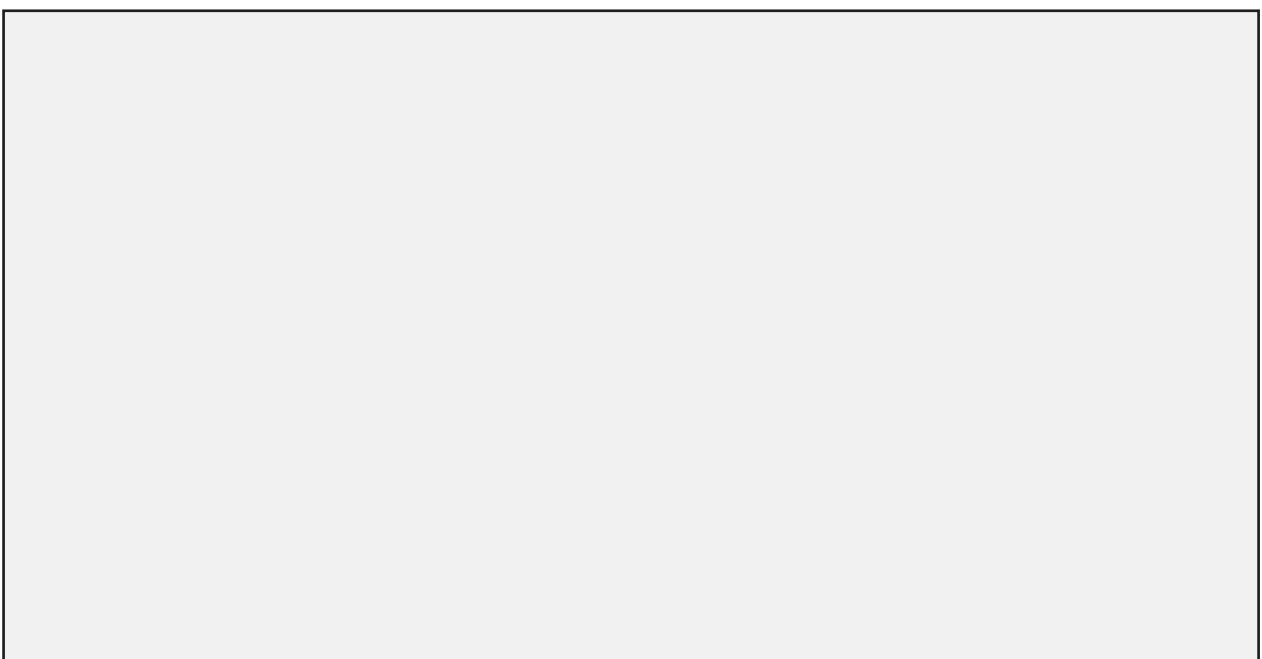
LET'S GET CLEAR

Knowing WHY you do what you do is so important because it will be what keeps you going when you don't feel like it.


Your WHY



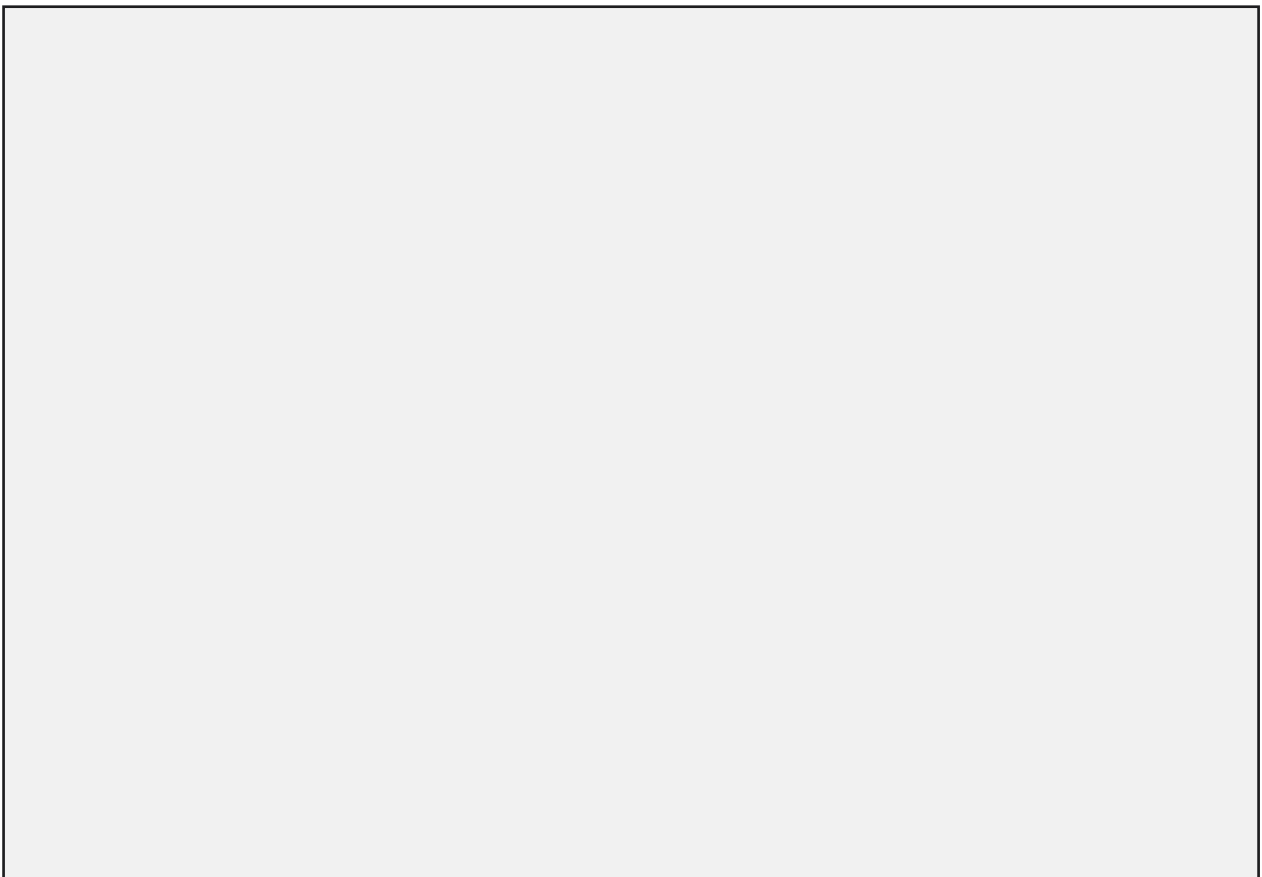
Your BIG Dreams



What is it you REALLY want from your business in 2021? (More time? Less stress? More money? Better clients?)



What would a super successful 2021 look like?



DEVELOPING YOUR BRAND STORY – LET’S FIND YOUR NICHE

What is the MAIN problem that your clients/customers have? {Think high-level, overarching problem}

Example:

A career coach may say that her clients feel unfulfilled in their current position.



Now that you have identified the problem, let’s identify WHO has this problem, be specific about who they are...

There are probably many groups of people who have this problem, but who are the ones you really, REALLY want to help?

Example: All of these groups could feel unfulfilled:

- ★ New Moms who feel like they don’t have a good work-life balance
Recent graduates who took the first job offer they could get instead of waiting for one that they really wanted
- ★ Seasoned professionals who have lost their passion and are looking for something new.

The point is to be as specific as you can about who you want to help.

Now let's dig deep to learn what words they use to describe their problem.

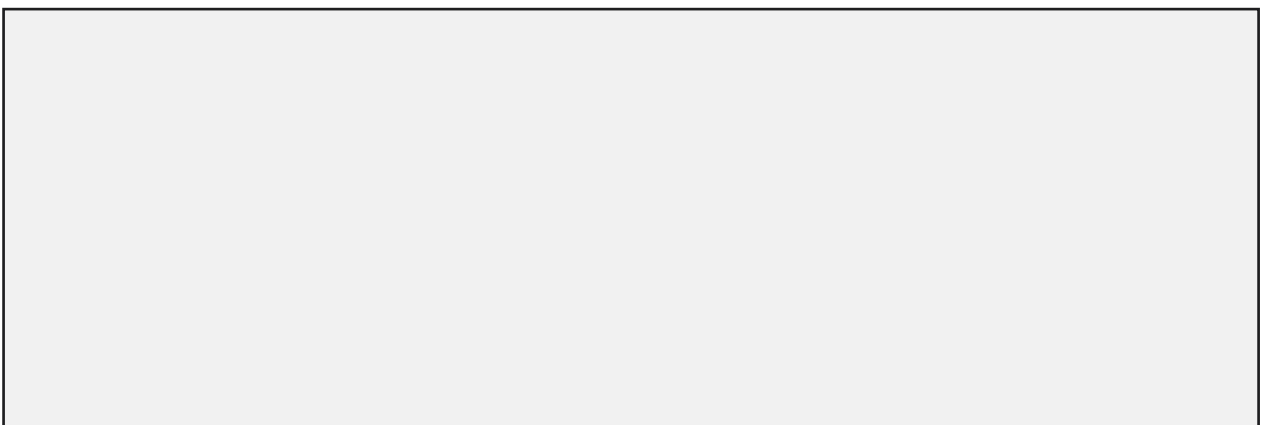
Use your imagination and put yourself into their shoes and write a journal entry as if you are them, right before they call you or land on your website.

What are they thinking? What brings them anxiety? What are they afraid of?



Finally, let's get really clear on what they really want. What is the main result they are hoping for/how do they want their lives to change?

Remember: Use **THEIR** language here.



Now you should have a solid idea of who you serve, and the solution for their problem.

THE FINAL STEP IN THIS PROCESS IS TO FIND YOUR “SECRET SAUCE”

Your secret sauce is what makes people purchase from you instead of your competition.

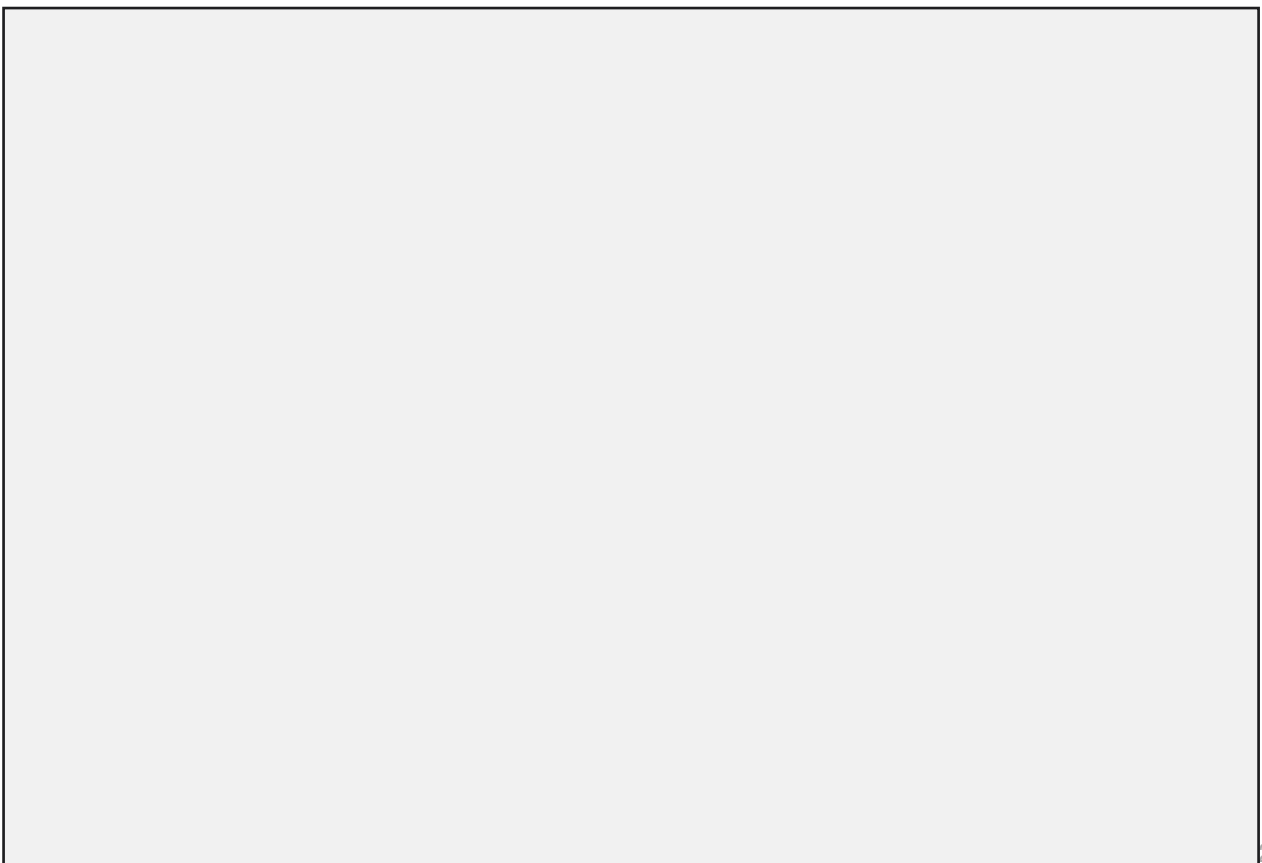
To eliminate the competition, incorporate YOU into your business.

Incorporating YOU means they can't go anywhere else to get the product or service and awesome experience working with you provides them.

STEPS TO FINDING YOUR “SECRET SAUCE”

1. LIST YOUR ACCOMPLISHMENTS - NOTHING IS TOO SMALL.

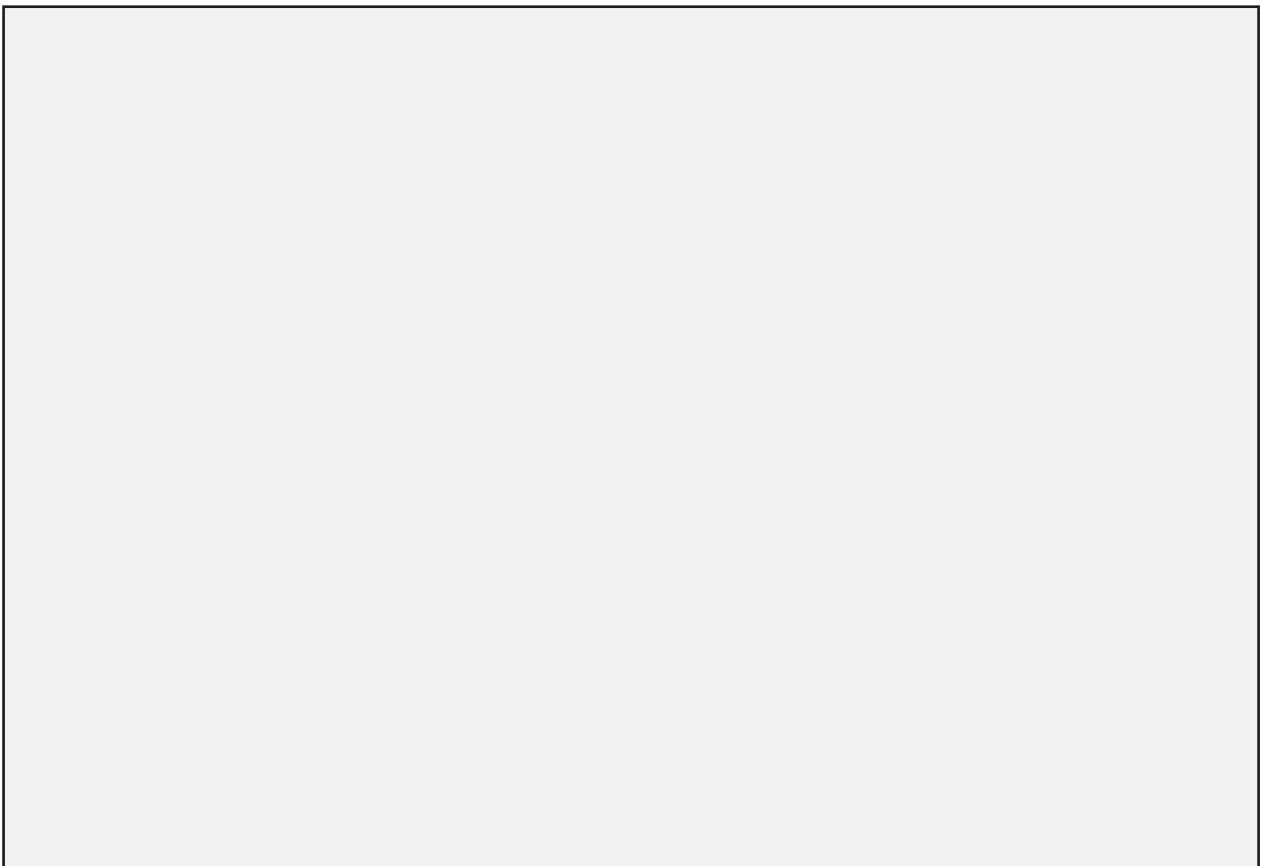
Education, sports, awards, first in family to graduate, founded an organization; brainstorm and list everything:



2. LIST YOUR NATURAL STRENGTHS AND GIFTS - WHAT COMES NATURAL TO YOU? WHAT DO PEOPLE ALWAYS COMPLIMENT YOU ON?



3. STORY BOX: WRITE 5-10 SHORT STORIES ABOUT YOUR NATURAL STRENGTHS OR YOUR ACCOMPLISHMENTS TO BE USED ON YOUR WEBSITE, SOCIAL MEDIA OR WHENEVER YOU NEED THEM.



NOW, LET'S PUT IT ALL TOGETHER TO FORM YOUR BRAND SUMMARY:

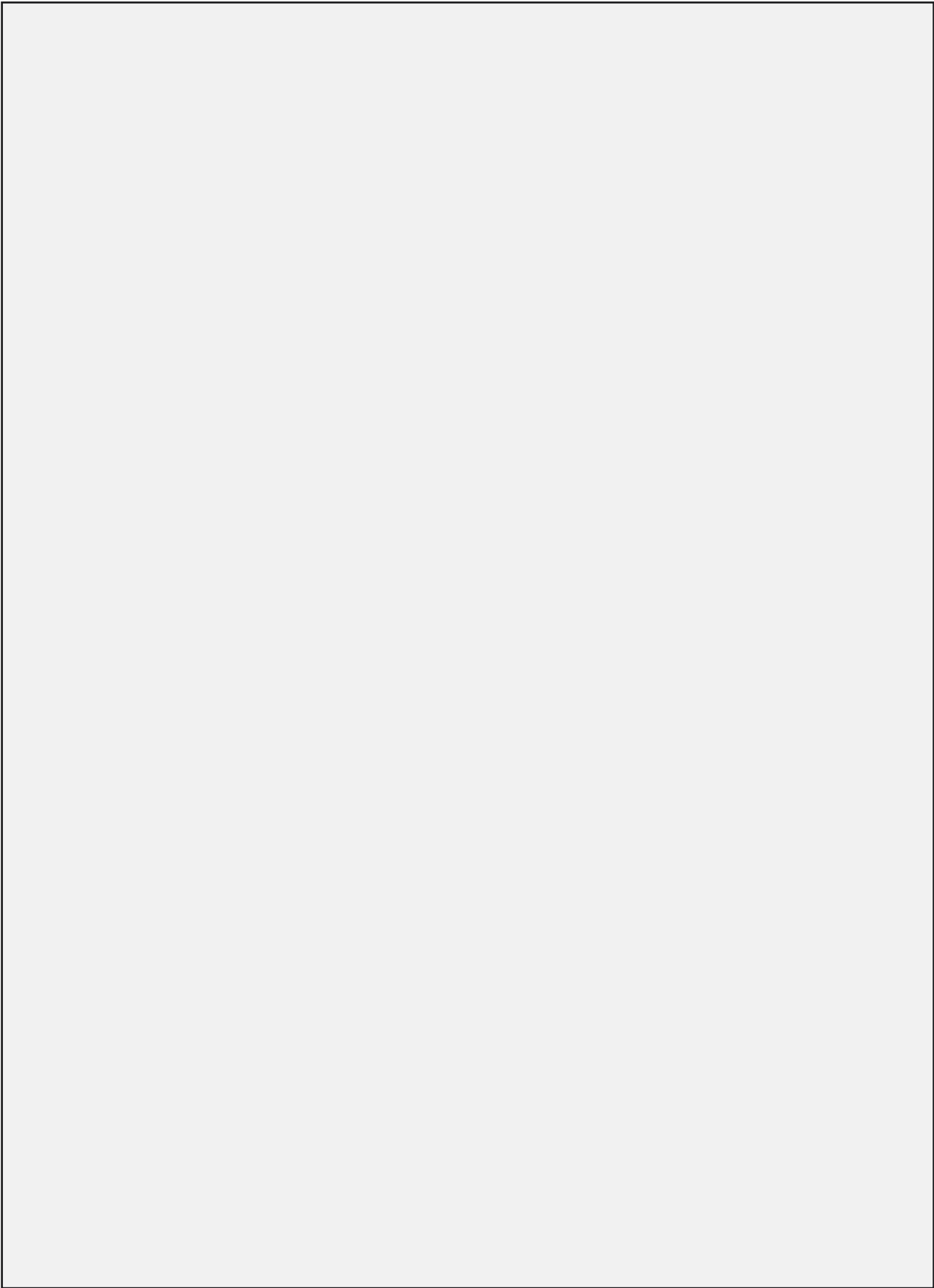
I help _____{dream clients} with _____{their problem} so that _____{what they really want}.

“IS IT ‘GOOD ENOUGH’?” — A CHECKLIST TO KNOW FOR SURE!

- ★ If you can say YES to all of the statements below, then your summary is done. If not, keep working on your summary until you can.
- ★ I begin my summary with “I’m a” or “I help” or something very similar. The summary begins with the problem your clients face and ends with the result they want, not vice versa.
- ★ I have not included any information on how I do my work or what my process is. For example, I don’t use language like, “through journaling” or “using my unique process” or “with 5 simple tools.”
- ★ I know for sure that every single word in my summary is one that my target client/ customer would use before he/she hires me (not after she’s learned it from me).
- ★ I haven’t paraphrased anything my client says into a new phrase he/she wouldn’t use.
- ★ I’m using his/her exact words throughout the entire summary.
- ★ I have limited my summary to 3 concise sentences (or fewer), and the sentences aren’t run-ons or really long.
- ★ I can easily remember my summary and share it with a stranger.
- ★ When other people read or hear my summary, they instantly know a specific person who could use my services.
- ★ When I read my own summary, I feel a strong resonance in my body and deeply know that it’s right.

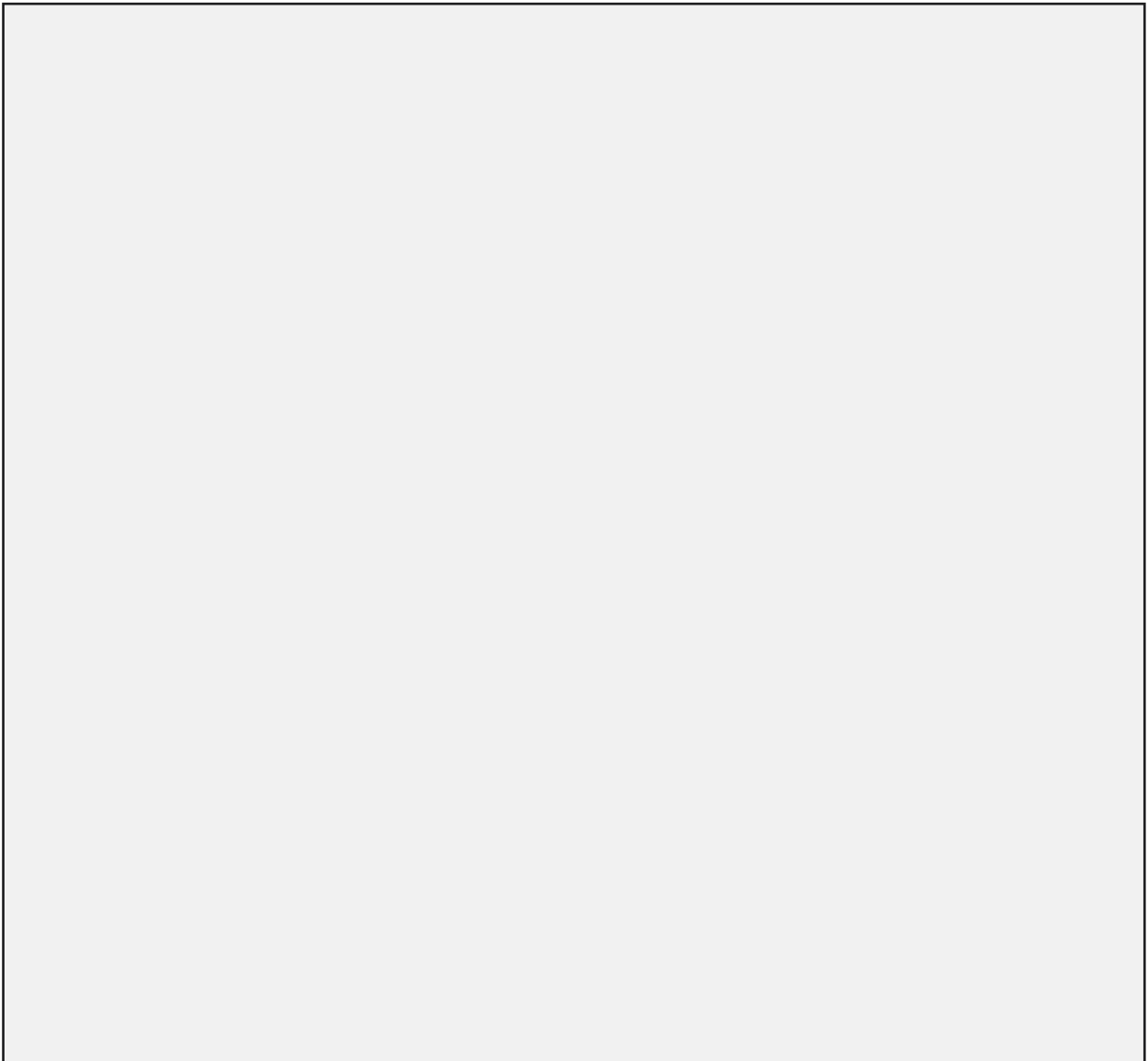
Keep working on your summary until you can check all of these off.

CREATING YOUR SIGNATURE PRODUCT/SERVICE



CREATING A RESOURCE TO BUILD YOUR LIST

Going back to the exercise you did where you wrote a journal entry as your dream client and you listed their pain points...what quick solution can you provide for them before they actually hire you, or even if they never hire you? Brainstorm.



What free resource or guide will you create to help you build your audience and establish yourself as an expert?

When will you create it by?

Block off time to work on this on your calendar. Put your deadline date on your calendar.

MARKETING

Let's find your clients/customers

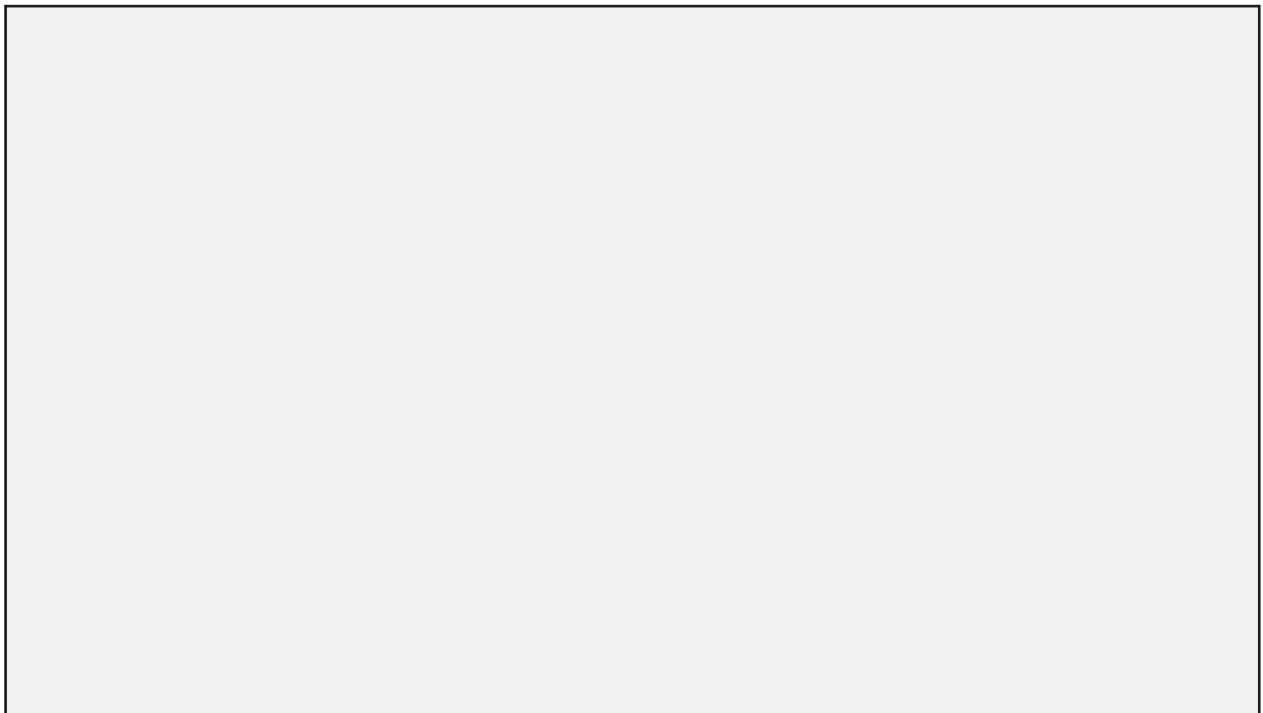
Where are your target clients?

In order to market to your target clients, you have to know where they are.

Start by asking yourself, *"Who is already serving my target market? Who has a large captive audience of the kind of people who could really benefit from what I have to offer?"*

As you look at each question or prompt below, if you don't know the answer immediately, don't give up. Don't say, *"I don't know."* Or *"I don't know how to find out."* Be resourceful and use the world's best free research assistant: Google.

WRITE DOWN THE NAMES OF COLLEAGUES {OR COMPETITORS — DEPENDING ON WHAT WORD WILL TRIGGER MORE IDEAS FOR YOU} THAT ALREADY REACH YOUR TARGET CLIENTS.



Aim for at least 5, but 10 would be even better!

WHAT ARE AT LEAST 7 BLOGS THAT YOUR DREAM CLIENT/CUSTOMER MIGHT VISIT REGULARLY?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____

What online newsletters do they subscribe to?

What online services or software do they use?

What podcasts do they listen to?

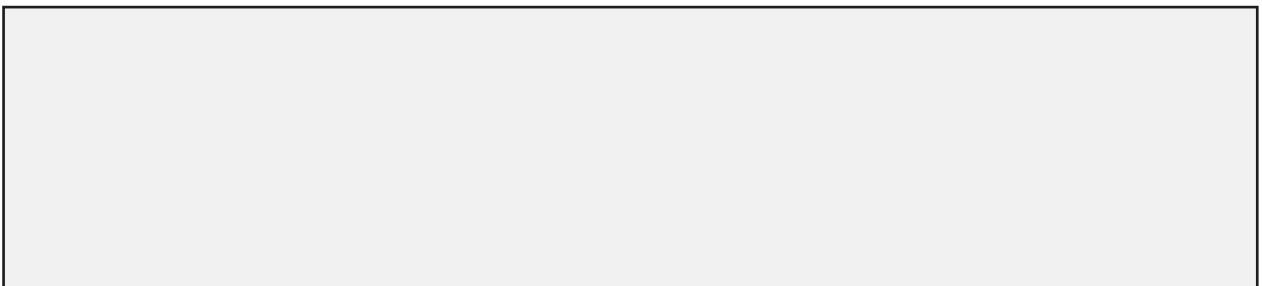
What organizations, associations or clubs might they belong to?



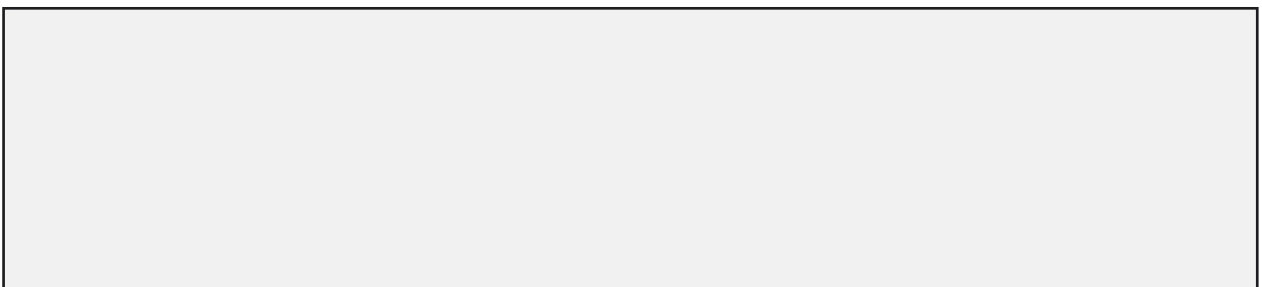
What magazines do they subscribe to or read regularly?



If you have a local business, what local newspapers do they read? Or what local restaurants or shops do they frequent?



Who are their favorite authors?



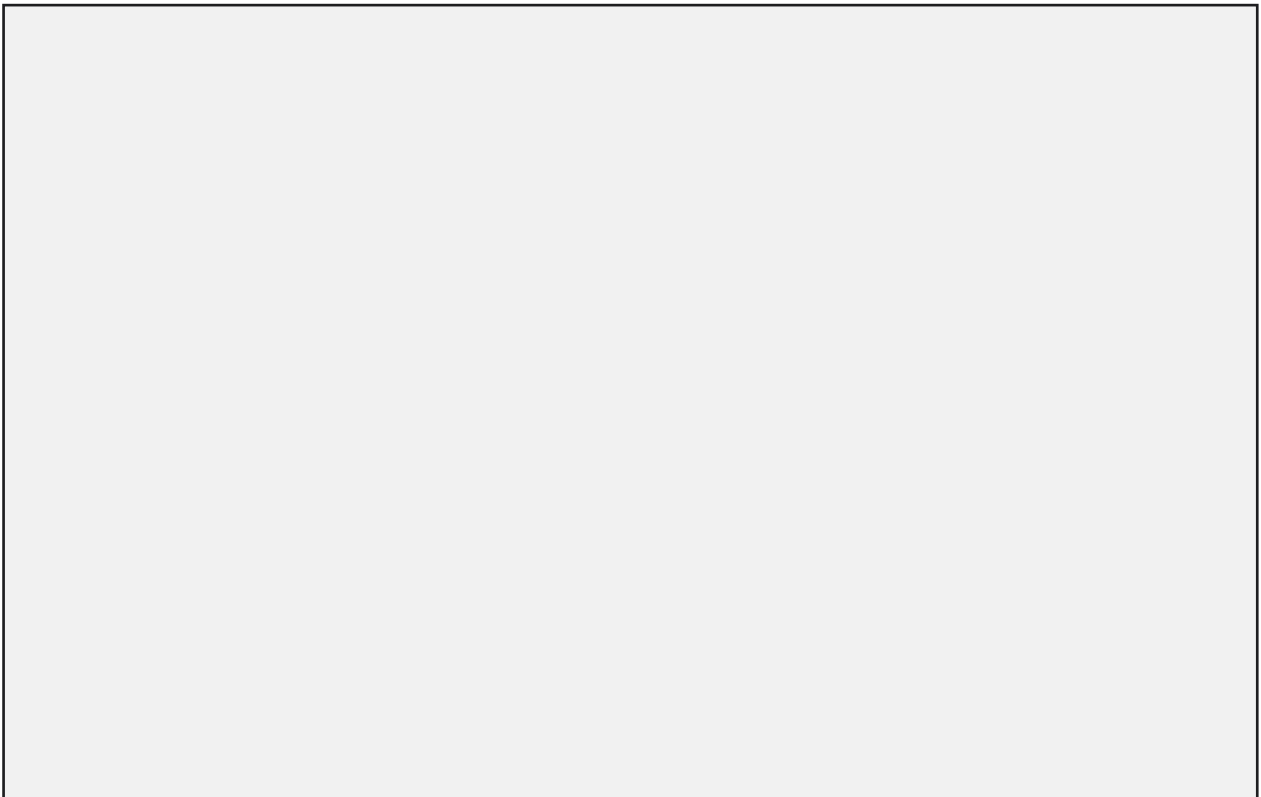
Where do they spend time on social media? Are they on Twitter, YouTube, Facebook, LinkedIn, Snapchat, Pinterest, Instagram, TikTok or _____{some other social site}?



Which people or companies do they already follow on those platforms?



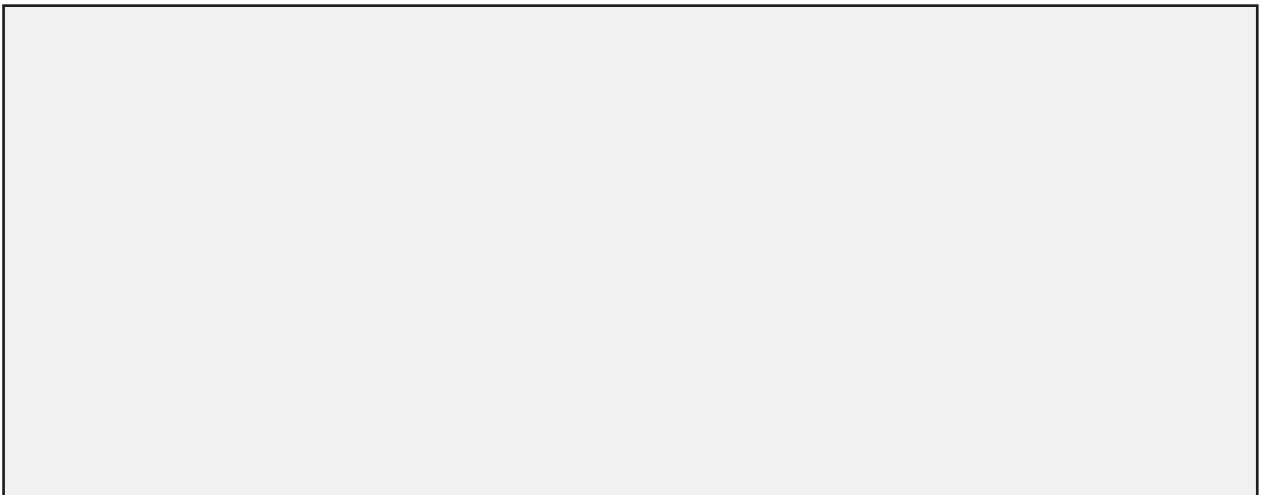
What are the questions, or phrases they might search for in Google that relate to your business (i.e. the product, service or solution you provide)? Google those phrases now and see what other sites come up in search. Write them down below.



Which events do they go to every year? Think about industry conferences, expos, retreats, seminars, concerts, art festivals, film festivals, and workshops.



Who are people or companies already selling complementary (or competitive) products, services or programs to your dream clients or customers?



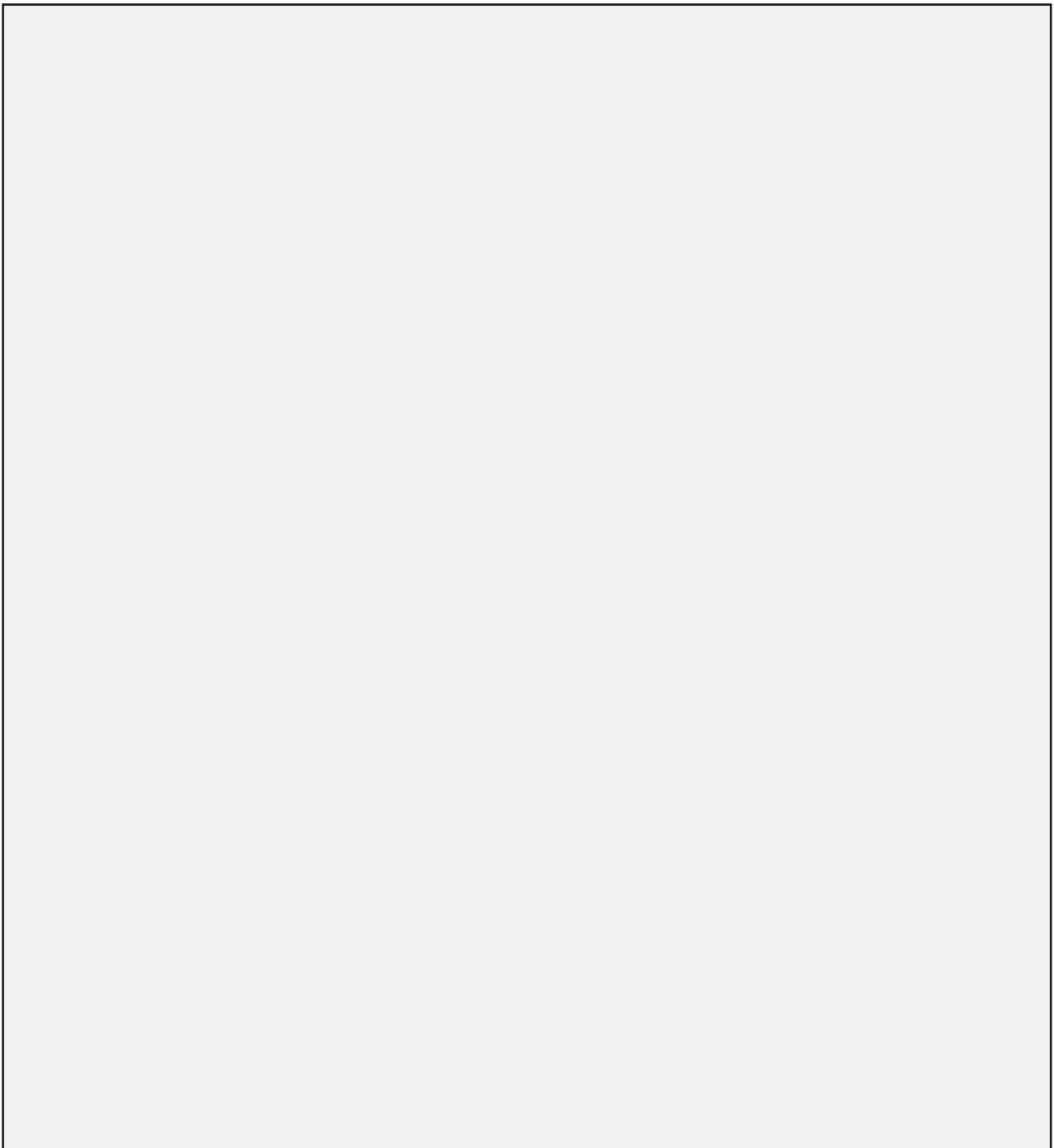
Said another way, what businesses offer complementary products or services? For instance, a popular spinning studio likely reaches people that are interested in health, nutrition, spirituality, and personal development.

A fashion boutique may reach people interested in beautiful stationery, candles, jewelry, or art books.

A local coffee shop will likely reach people interested in art, entrepreneurship, and local artisans.

A financial services firm that caters to high net worth individuals is going to reach people interested in estate planning and life insurance.

Write down any ideas that come to mind about people who offer complementary products and services.

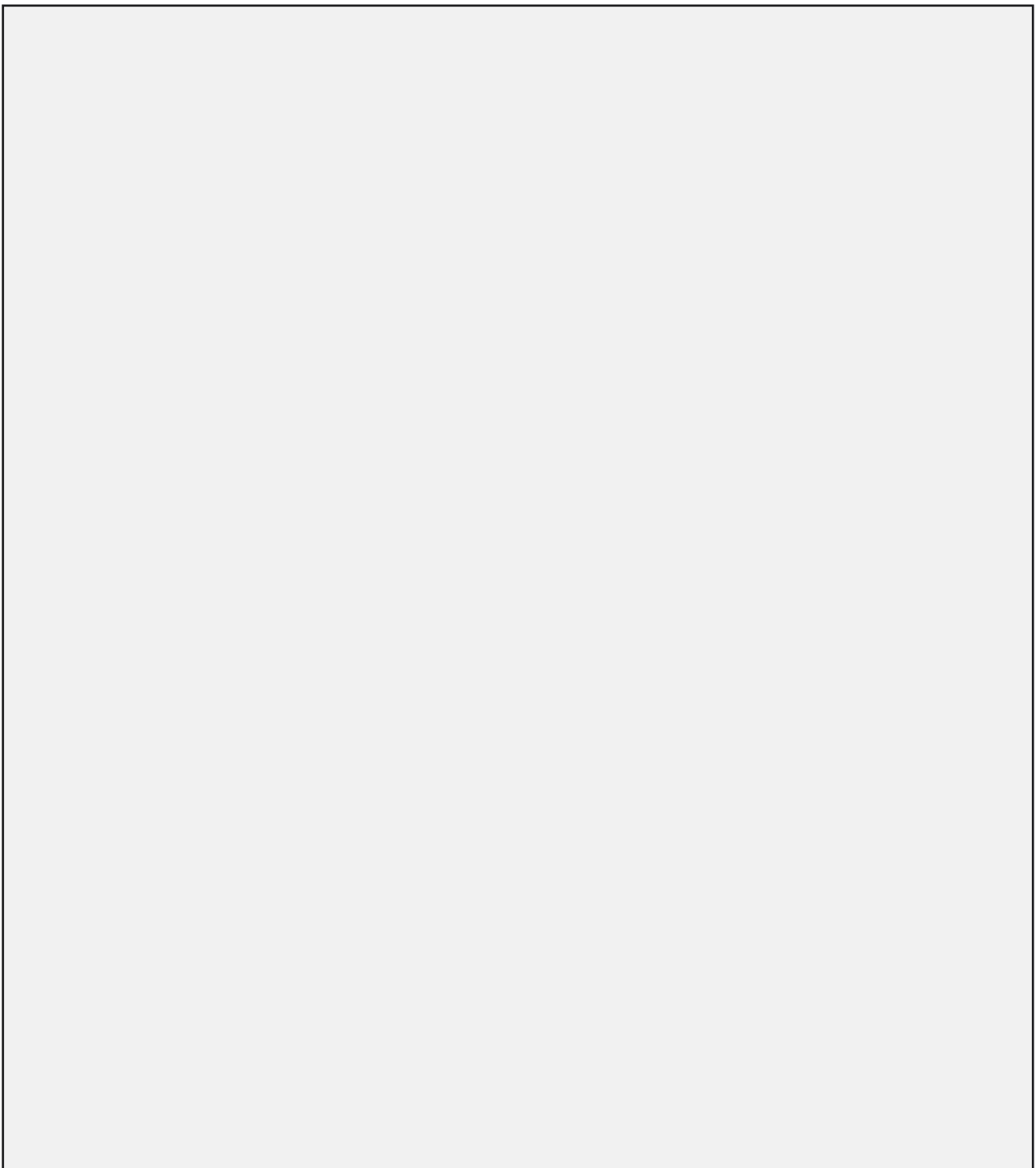


PUBLICITY

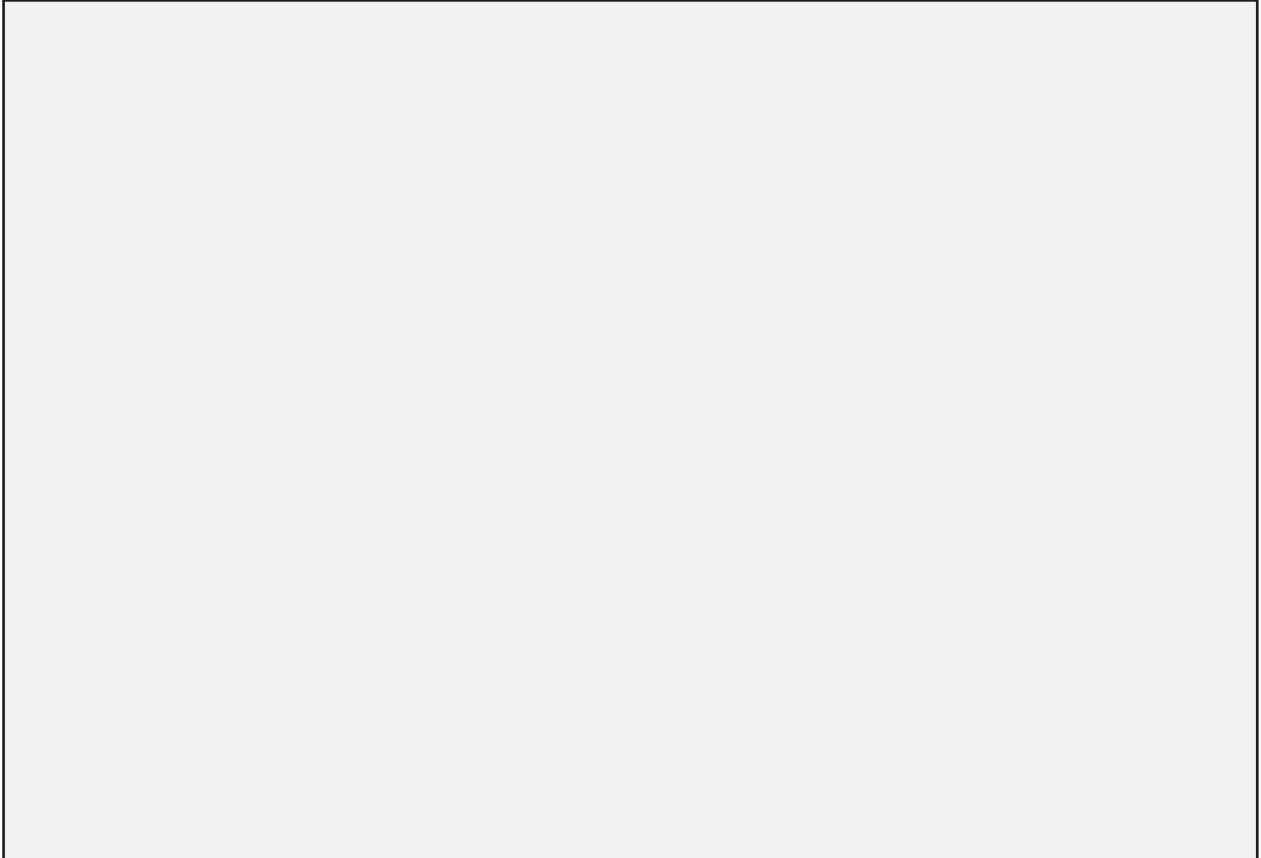
Opportunities to present yourself as an expert is a great way to build your brand and market your business in an authentic way.

The goal is to establish yourself as the authority dominating your niche.

From the lists you wrote above, which blogs, podcasts, radio shows, newspapers, magazines, etc. could you pitch yourself to? Brainstorm ways to get featured.



Are there any strategic partnerships or joint ventures you'd like to initiate with those who offer complementary products or services? List possible partnerships here:



What other marketing strategies can you use to grow your business in 2021?

- ☐ Podcasts
- ☐ Video
- ☐ Social media
- ☐ Online workshops
- ☐ In-person workshops

Are there certain seasonal/holiday/events relevant to your niche or important to your dream clients/customers? Research and brainstorm. (i.e. National Entrepreneurship Week, Women's History Month, etc.) Visit <https://nationaldaycalendar.com/> for ideas/inspiration.

CONTENT TOPICS BRAINSTORMING

Your objective is to brainstorm at least 40 content topic ideas for your blog/vlog/live streams/email newsletter, etc.. This will save you so much time in the future and you can go ahead and put these on a calendar now.

Answer each of the following questions and use a separate journal or document to record your answers. Of course, not every question will be relevant to your business.

The goal is to challenge yourself to generate as many ideas as possible. We'll edit down in a little bit.

STEP #1 - ALL ABOUT YOU

Let's start by looking at what you're genuinely interested in writing and speaking about.

- ★ What do you want to talk about, teach about, share about?
- ★ What do you stand for — in your business and life?
- ★ What difference are you working to make to your clients/customers, your community, in the world?
- ★ What do you find valuable, interesting, or worthy of deeper conversation?
- ★ What do you want to emphasize or draw attention to about your company, products, services or team?
- ★ What do you want to shine a spotlight on as it relates to your industry, strategic partners or your story?
- ★ Look around. What's happening in your community, in your industry, in the greater world or current events that you feel moved to comment on or connect back to your business?
- ★ What topics, issues or distinctions do you feel strongly about sharing with others?

STEP #2 - ALL ABOUT THEM

Now let's revisit your target client/customer profile.

- ★ What questions do they have about your topic/product/service or industry?
- ★ What results or outcomes are they trying to achieve?
- ★ How can you help them get where they want to go?
- ★ What is frustrating them as it relates to your topic/product/service or industry?
- ★ What's keeping them up at night as it relates to your topic/product/service or industry?
- ★ What are they struggling with that you could help solve?
- ★ What do they find entertaining?
- ★ What would they love to pin on Pinterest or share on Instagram?
- ★ What kind of information would make them tell their friends, "You've gotta see this..."
- ★ What could help them most right now?
- ★ What do they need to know, understand or be aware of, that they don't know to ask for?
- ★ What information would help them work with you or buy from you?
- ★ What are their fears or concerns about working with you?
- ★ What are their fears or concerns about your product, service, your industry or category?
- ★ What are they confused about?
- ★ What topics perk up their ears?
- ★ Who do they want to become and how can you help them get there?

STEP #3 - LET'S BRAINSTORM

Use these questions as a jumping-off point to brainstorm at least 40 topics.

The point of brainstorming is to let your brain go wild. If you generate more than 40 ideas, awesome.

Don't censor yourself, we'll sort the good from the bad later. To make your life easier number your topics as you go.

1. _____
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39. _____
40. _____

STEP #4 - NARROW IT DOWN

Look at your big brainstorming list and ask yourself: which ideas do you feel confident would provide great value to your audience and are topics you feel excited to write and produce?

Go back and circle your top 26 ideas. The reason for 26 is because if you plan to publish content weekly, you'll have half of a year of great ideas ready to go. If you publish bi-weekly, you'll have a whole year!

If you don't have 26 topic ideas you like, or if you find even more, that's fine. You can never have enough great ideas for content. If you come up short, that's okay too.

YOUR COMMUNICATION PLAN

GOAL: STAYING IN TOUCH WITH YOUR AUDIENCE

Now that you've started building your list and your social media following, it's important that you stay in touch with them by giving them fresh valuable content so that you can stay top of mind and also occasionally show them opportunities to purchase your products and/or services.

There's no one-size-fits-all solution to designing an effective communication plan for your business. Every business owner is different in terms of their strengths and

capabilities and every audience is different in terms of how often they need or want to be communicated with.

For example, some businesses publish daily blog posts, whereas, other businesses only send out a monthly email update. It's not unusual for fashion retailers to send sales emails daily and update their Facebook, Instagram and Snapchat accounts multiple times a day!

Then there are some business owners, who also host podcasts, publish new episodes daily, weekly or even in seasons, like a TV show.

As you can see, the choices are endless. The key is to find what works for you and stick with it.

CONSISTENCY IS KEY

OK LET'S DIG IN.

Here is my 3-step process for choosing the perfect communication plan for you:

STEP 1: CHOOSE THE FREQUENCY

Taking into consideration your strengths, your workload, your life outside of your business and your business model, how often can you commit to staying in touch with your audience, at least for right now?

Is it daily, weekly, bi-weekly, monthly, quarterly or something else? What frequency can you absolutely commit to, no matter what? If you're just starting out, start simple. Less is more. Think quality over quantity. Starting small does not mean thinking small.

Use the space below to jot down down any thoughts you have about how frequently you'll publish free content for your audience.

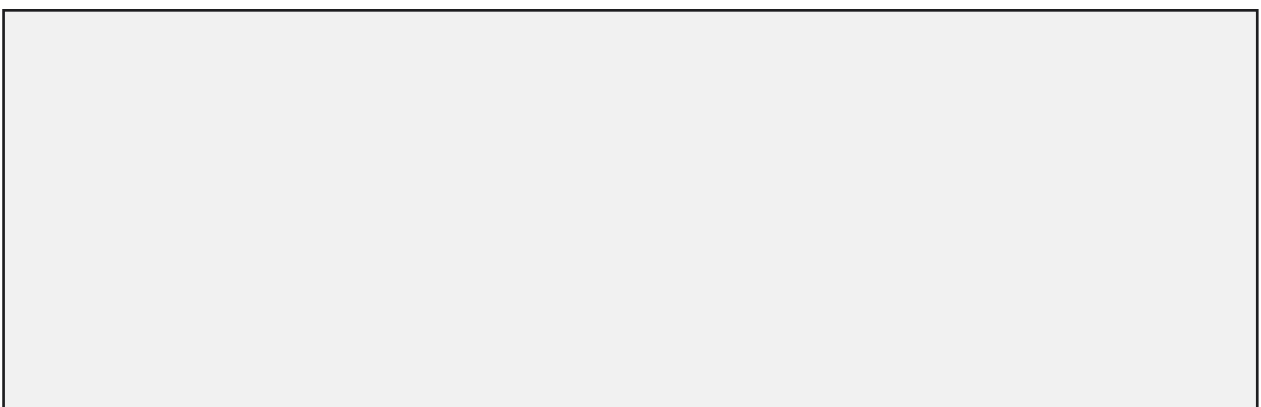


STEP #2 - EVALUATE HOW MUCH TIME IS NEEDED

What might it take to produce content at that frequency? How much time do you think it might take you to edit and publish a blog post, email broadcast, social media posts, or whatever you're thinking about creating?

Even if you don't know this for sure right now, it's OK. The goal is to start thinking about how much time it may take for you to be consistent at that frequency. This will help you look at the big picture of your business and life and make sure you're committing to something that is possible for you.

Use the space below to jot down your thoughts and ideas about how much time it might take to hit your frequency goals.



STEP #3 - DECIDE ON YOUR CONTENT FORMAT

Here are a few of the most common formats and methods of content delivery to get your creative juices flowing.

EXAMPLE OF BASIC CONTENT CREATION FORMATS:

- ★ Written text: newsletters, articles, blog posts, social posts, quotes
- ★ Audio/spoken word: MP3 files uploaded to accompany a blog post via SoundCloud or delivered via Podcast
- ★ Video: YouTube, Instagram or Facebook video, either alone on those platforms or embedded in your blog post
- ★ Graphics: Infographics, illustrations, quote cards, photographs, GIFs
- ★ Multi-media mashup: using multiple formats together

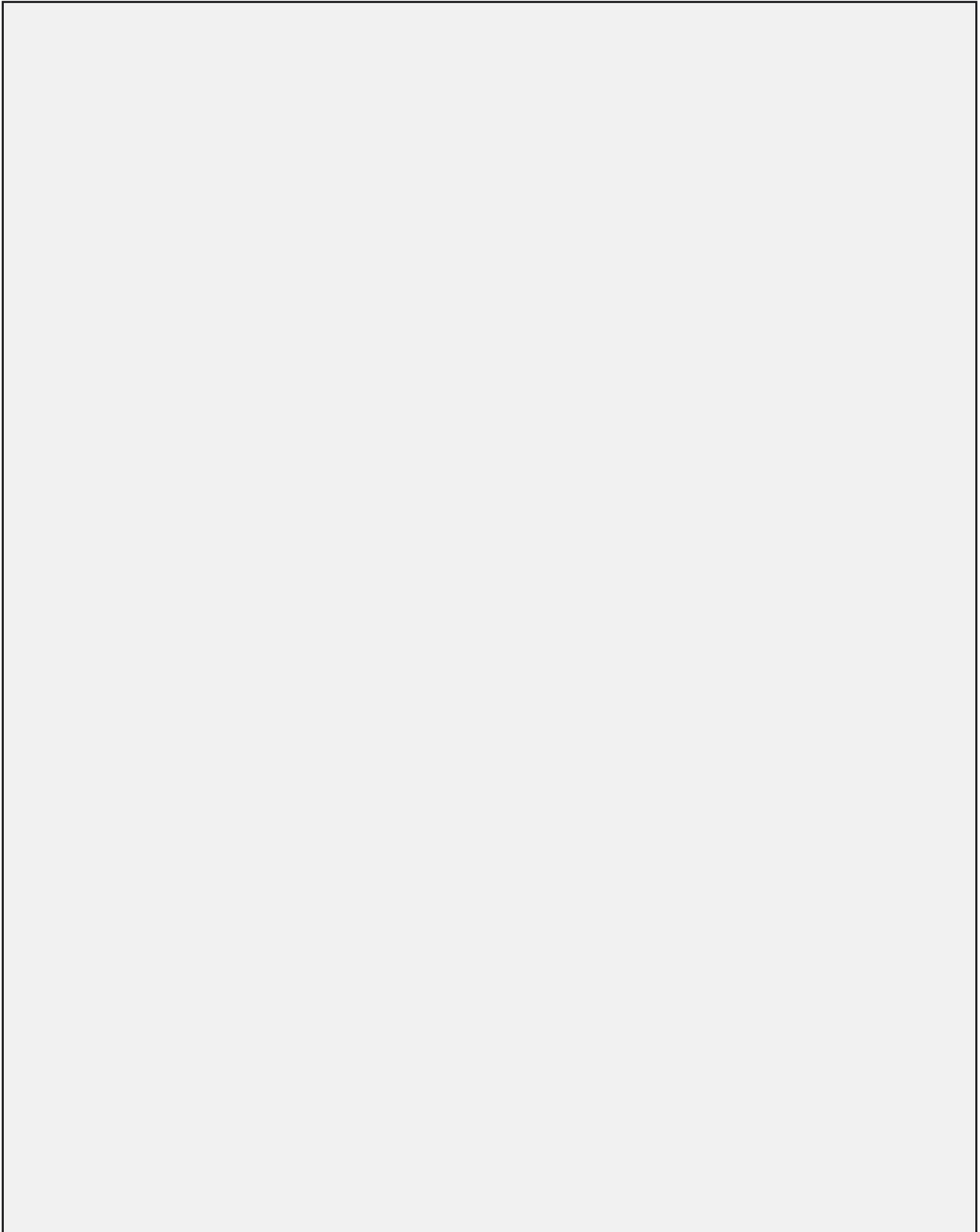
FORMAT DELIVERY:

- 📧 Email Only: content that is produced and published only through email
- 📧 Blog Post & Email: content is published on your blog, and you send out an email broadcast that either mirrors the blog content and/or directs people to the blog post for the full article
- 📧 Social Media Only: (not recommended as your only communication because you don't own the connection with your audience - the platform does!)
- 📧 Social Media Update: sharing about a new blog post, video, podcast, etc. on your social feeds with links directing back to the full content

Now let's think about your business. When it comes to the format that will best align with your strengths, capabilities and really communicate value to your audience, what format(s) come to mind? Think about your business model and what your target client might need to know, understand, see, hear or receive from you on a consistent basis. What are you selling?

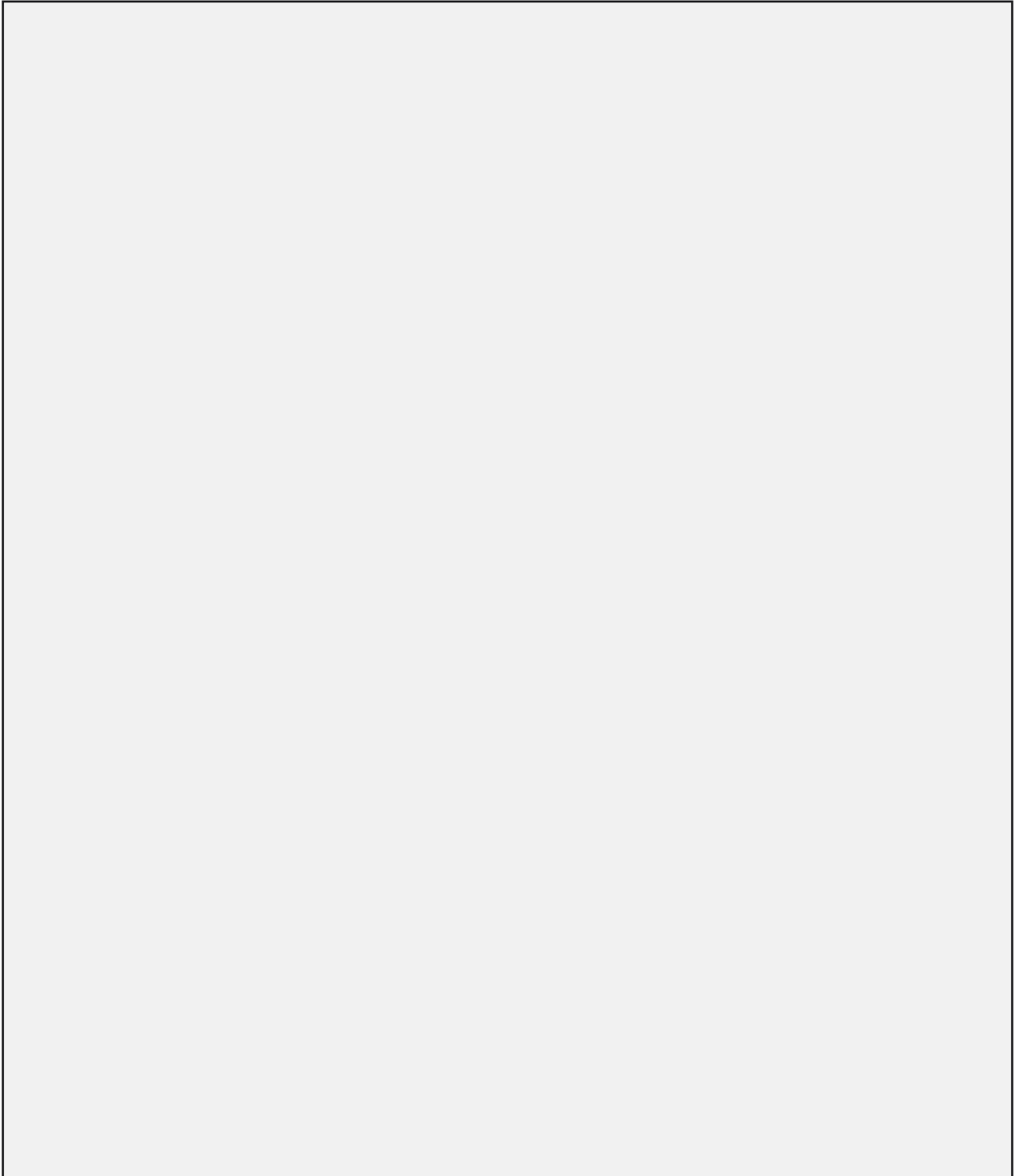
For example, using only words to sell clothing is not a wise choice. Your customers will need to see detailed images of the product along with fantastic product descriptions.

Use the space below to jot down your ideas about the format of your content.



YOUR MARKETING PLAN



Now that you have a few ideas and strategies, make your 2021 marketing calendar and fill in which activity you will do each month. Be sure to include the relevant holidays/events to enhance your marketing efforts.



YOUR GROWTH PLAN - LET'S LEVERAGE

BUILDING YOUR DREAM TEAM

At a bare minimum, in order to make sure your business is protected and profitable, you will need:

-  A Business Lawyer - to protect your business and brand
-  A Bookkeeper and/or Tax Expert - to protect your profits

In order for your business to grow, you have to leverage systems and people.

SYSTEMS

Which systems do you need to implement and automate?

- ☐ Client intake
- ☐ Onboarding
- ☐ Client communication/follow-up
- ☐ Content production
- ☐ Closing out

DELEGATION

How much time are you currently spending on these tasks?

- Telephone service/client intake: _____
- Billing/accounts receivable/bookkeeping: _____
- Social media: _____
- Blogging: _____
- Content creation: _____
- Website maintenance: _____
- Client relations (customer service): _____
- Business Development/Marketing/PR services: _____
- CRM/potential client follow-up: _____

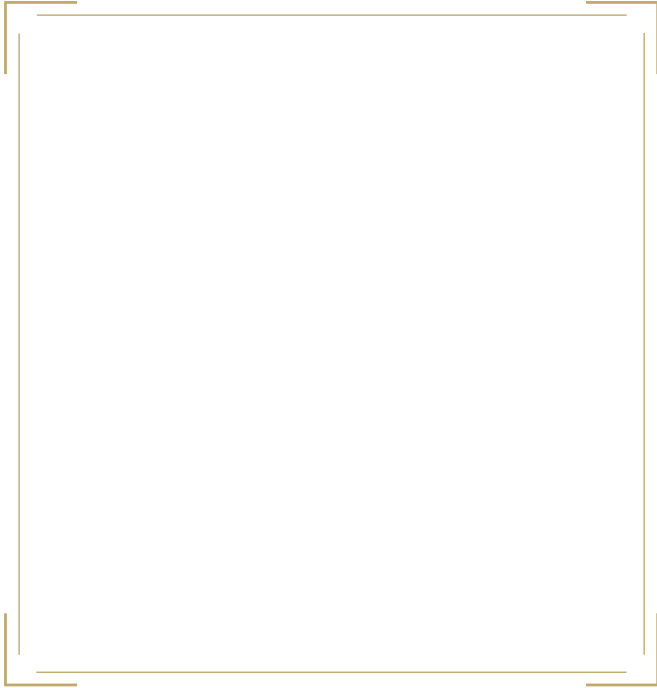
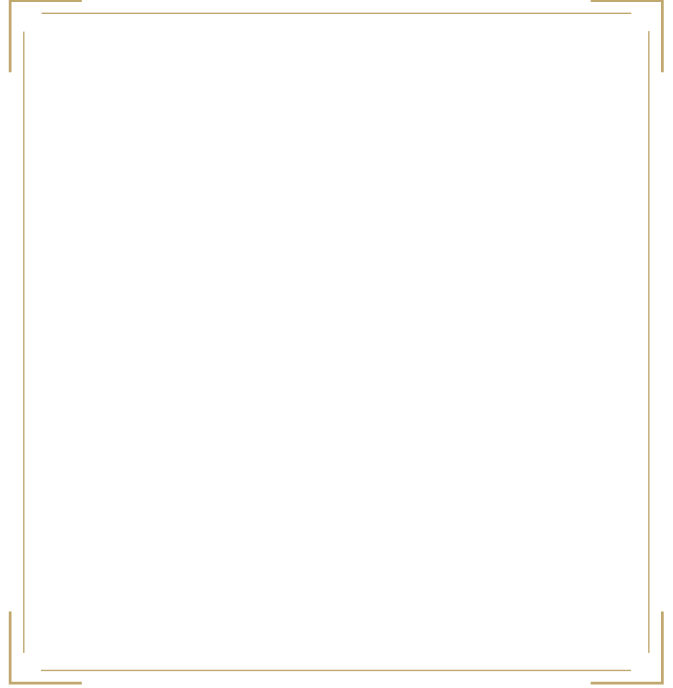
What can you delegate to a virtual assistant?

BUSINESS PLAN

Prepared for: _____

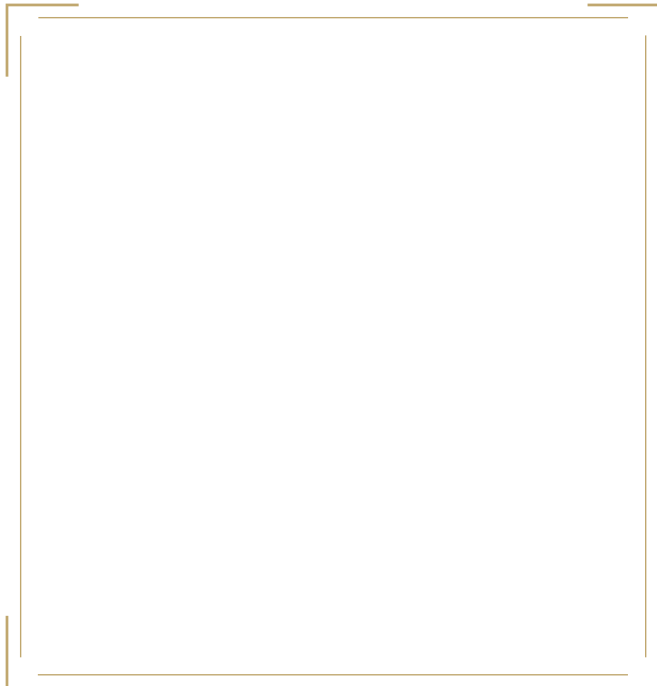
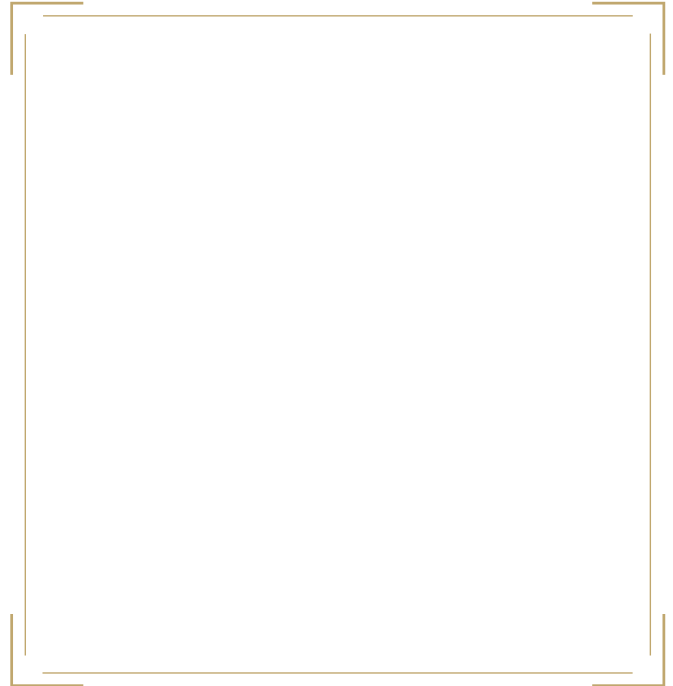
brand summary

ideal client

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products / services

competition

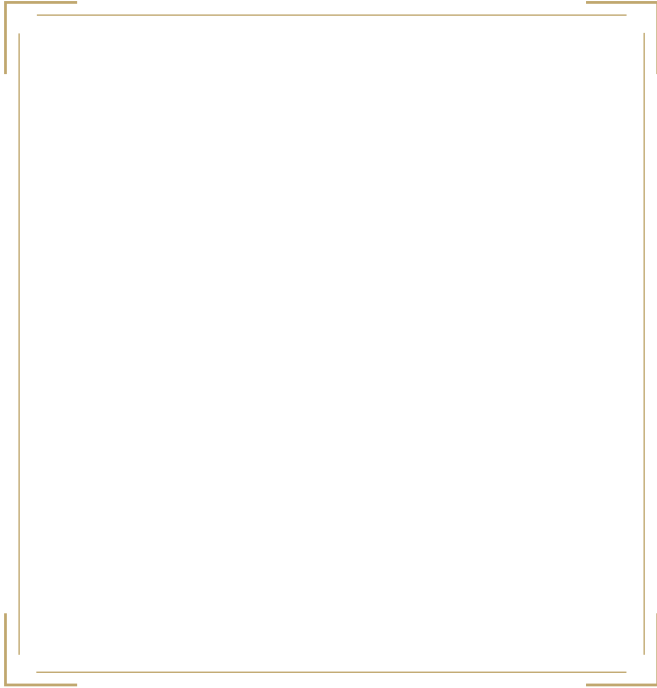
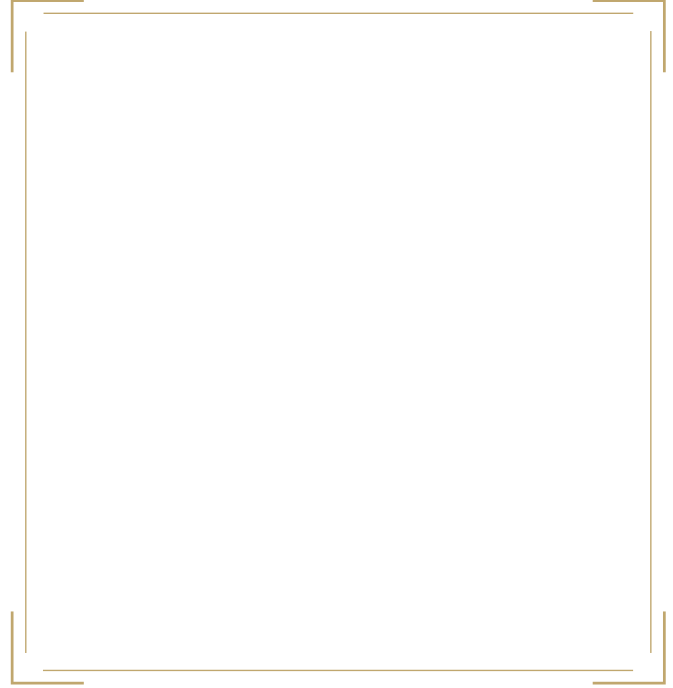
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BUSINESS PLAN

Prepared for: _____

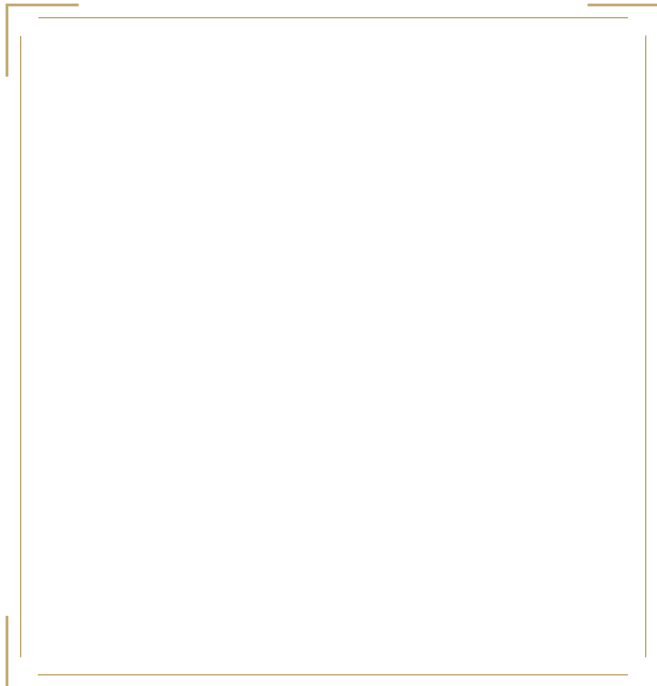
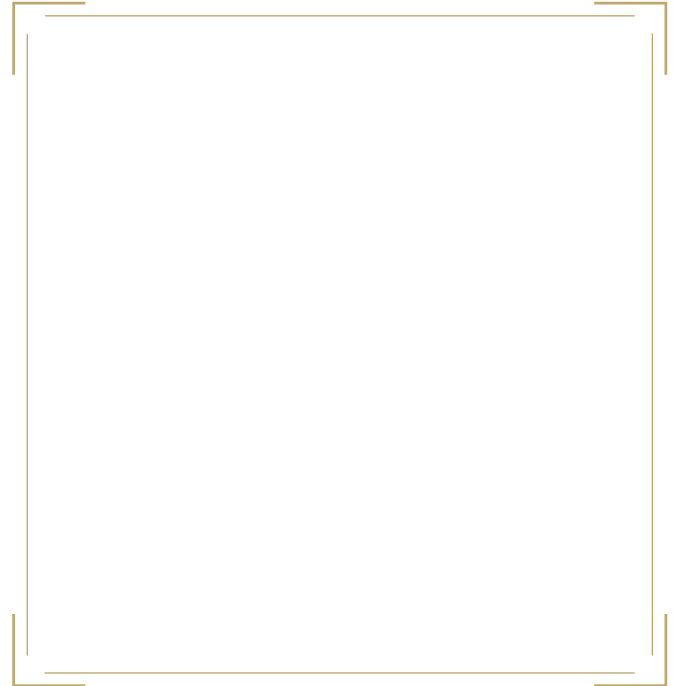
marketing

systems

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finance

continuing education

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