



## Business Coaching Bullets

- Assessment
  - DiSC
  - Personal interview
- Define desired outcomes
- Establish SMART goals – financial, business/career, personal, physical
- Establish values, vision and mission – company/team/individual
- Personal/professional development system in place
- Time mastery – circular schedule, red/yellow/green activities, big rocks, planning
- Establish and track KPM's (key performance measures) –the vital signs
  - Financial – profits, margins, costs
  - Sales – monthly sales, new clients, etc
  - Production – billable hours, on time %, etc
- Establish routine reporting
  - Financial
  - Sales
  - Production
- Establish customer service plan and processes
- Easy to buy – least path of resistance in place for portals of purchase – retail store, web site, phone, email
- Sales system in place
- Sales scripts and templates
- Unique selling proposition
- Ideal client profile
- Lead generation sources
- Testing and measuring in place – lead source, cost of lead gen, conversion, average \$
- Guarantee established and properly marketed
- SOP's – systemize everything: sales, admin, production
- Operations Manual
- Organizational chart – first roles, then names
- Positional clarity – CSE's/RRE's (roles, responsibilities and expectations)
- Leadership – 1:1's scheduled; agenda template written
- Resources
  - Books
  - Web Sites
  - Audio/Visual – POD Casts, other
  - Workshops/Webinars
- Recruitment/hiring process documented
- Orientation process documented