

(plan ● act ● succeed)

an action plan for your business
using 10 easy-to-use tools



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copyright and legal stuff.

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First Edition

introduction.

Why **Plan • Act • Succeed** and not a Business Plan?

Simple. A business plan is an in-depth planning document that allows you to run your business according to a well-thought out plan. That's a good thing.

Unfortunately, business plans are complex, expensive, expansive and very hard to compose. In fact, there are professional companies that can help you do this (and you pay them LOTS of money). Also, once most business plans are complete, they end up in a file cabinet somewhere rarely to be reviewed again.

Plan • Act • Succeed is a lot like a business plan and yet it is decidedly different. It takes the best elements of a typical business plan and distills them into actionable steps. Also, it reduces the paperwork from 70-100 pages down to just 10 simple tools you can remember and leverage frequently during the calendar year.

Look at the design - no fancy fonts, no staged business photos - just straight talk to communicate each tool quickly and efficiently. My goal is not to waste your time.

Finally, this book is an **Anti-“Business Book”**. Most business books are written from a single great idea and go for approximately 50 to 100 pages. Then the editor/publisher sticks their nose in and states that the book must run 200-300 pages to sell effectively. Guess what? You now have a good idea with LOTS of boring and useless filler.

With **Plan • Act • Succeed**, there is no filler - just straight talk and valuable tools. That's why I call it the Anti-“Business Book” - it's easy to read, understand, and use.

It doesn't sit on your shelf - it sits front and center on your desk.

Enjoy!

A handwritten signature in blue ink that reads "Rich". The signature is stylized with a large, sweeping initial 'R' and a long, horizontal tail stroke.

(plan ● act ● succeed)

“Far better it is to dare mighty things,
to win glorious triumphs, even though checkered by failure,
than to take rank with those poor spirits who neither enjoy
much nor suffer much, because they live in the gray twilight
that knows not victory nor defeat.”

- Teddy Roosevelt

table of contents.

What we are going to do together . . .

10 tools - quick, simple, and straightforward. Here goes:

30,000 foot view

Three Goals for This Year - page 8
USP (unique selling proposition) - page 11

Inward Analysis

SWOT (strengths, weaknesses, opportunities, threats) - page 15

Customers

Target Customers - page 21
Marketing Strategies - page 24
Sales Lifespan (connect, acquire, retain, extend) - page 27

Money

Basic Financials - page 31

Branching Out

“Connecting” Opportunities- page 35
My Flexible Elevator Speech - page 38

Taking Action

My Action Plan - page 42

how each tool is constructed.

It's pretty simple.

For each of the 10 tools you will find:

An Instruction Page. This page is composed of three columns:

- Intro - What is this tool? Why should I use it?
- Application - Real-Life . . . how did Rich use it with one of his clients?
- How To Use - Exact instructions on how to fill out each area.

An Example Page. A sample page that clearly lays out a typical business. This will allow you to quickly understand the format and give you ideas on how to fill out your own page.

Your Own Page. The actual tool that you can fill out. Feel free to copy and make lots of corrections or modifications!

The image displays three screenshots illustrating the structure of the tools. The top screenshot is an instruction page titled "three goals for this year." It is divided into three columns: "Intro" (labeled 'a'), "Applications" (labeled 'b'), and "How To Use" (labeled 'c'). The middle screenshot is an example page titled "USP (unique selling proposition)." It features two columns: "basic business elements (competitors)" and "distinct elements of your business (what's different/unique?)" with a list of five items. The bottom screenshot is a blank tool page titled "USP (unique selling proposition)." It has the same two-column layout as the example page, with the first column containing a numbered list from 1 to 5.

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30,000 FOOT VIEW

“I can teach anybody how to get what they want out of life. The problem is that I can't find anybody who can tell me what they want.”

- Mark Twain

three goals for this year.

Why do I set goals now and not at the end?

Intro:

Great question. Here's an example - when you go on a trip, you have to have a destination (or a series of destinations). When you develop your yearly business plan, you initially have to have an idea of where you want to go.

This strategy gives you a sense of purpose and fuels your enthusiasm - which allows you to work on the "how" to get there.

Now you might say "I am not sure about these goals". That's okay - at the end of the action plan exercise, you are allowed to modify or change your goals based upon the new realities that are presented by the action plan tools.

Again, this entire book is constructed to be a "living" document, actionable, flexible, and easy to follow.

Application:

Many of my clients find that setting goals is the most fun AND frustrating part of coaching.

Fun because it allows them to dream, actualize, and grow their business.

Frustrating because they are worried that they are developing unrealistic or unattainable goals. It can be difficult to envision their business future 365 days ahead (this happens often).

I did have a client who set their goals for the year . . . and guess what . . . they surpassed each one.

Why? Because they knew where they wanted to go, how to get there and regularly tracked their progress.

How? They tacked their goals page to their bathroom mirror and stared at it every morning. "It was that easy."

How To Use:

Let's start with an easy set of instructions:

Think of 3 Outcomes:
They could be financial, client/customer based, growth based, marketing based, etc.

Keep them simple:
Not "War & Peace" length. One phrase or sentence. Direct and to the point - we are looking for your vision. We can elaborate on each later.

Add a metric:
Example: "Increase B2B sales by 20%" instead of "Grow business this year".

Set a deadline:
You don't want all of your goals to end on December 31. I find that if you pick goals that are interspersed throughout the year, your momentum is continuous and it actually grows. In addition, you also don't find yourself in October or November scrambling to meet your January plans.

three goals for this year.

	Deadline
1. Solidify client pipeline at 30 full-time clients.	6/1/08
2. Reach \$17K/month gross.	9/1/08
3. Complete 3 Books. Promote on national media (TV, Radio, Newspaper).	3/15/08 6/15/08

three goals for this year.

1.

2.

3.

Deadline

usp - unique selling proposition.

Why do I have to be unique?

Intro:

“You are unique - no one else is just like you!”

There is a lot of talk and business book drive to niche your business. I have seen people go crazy trying to figure out what specific area of their business will clearly resonate with the largest part of their potential client/customer base.

I come from the school of embracing everyone, staying flexible, and seeing where your business is going. And then slowly moving your business to those key areas where you see the biggest impact from your best customers. You move slowly to easily track your progress.

You also need to know how you differentiate from your competition. What are your innate strengths, qualities, capabilities, offerings, and experiences that separate you from the pack? That is what this tool is all about.

Application:

Many businesses open their doors and expect clients/customers to come flocking. That sometimes happens - especially if you are an ice cream shop in the summer.

But at one point in your business life-cycle, you will need to define certain characteristics that make you stand out.

I've worked with many clients to define their Unique Selling Proposition (USP) and they have found that it is easier to talk about (and sell) their business in a convincing manner.

In fact, I even use it myself. When I run into a prospect who needs a little push, I say: “I am one of the best executive coaches in the U.S. - who else do you know is regularly asked for his opinion on critical and timely business subjects by top newspaper and media outlets?”

It's because I have my USP clearly stated.

How To Use:

This is a two step process:

First, what are the basic elements? Talk about your products & services (depth and breadth), quality, reach (geography), experience, your team, your store.

This will give you those basic elements that form your business' foundation. It's what resonates initially with customers.

Second, why are you different?

Take each element and explain why it is different from your competitors. If you run an ice cream shop - you might list that you sell ice cream. The differentiator might be that you use all-natural and organic ingredients, or that you are open 365 days a year, or that you have over 400 flavors, or that all of your employees have gone to Ice Cream University.

Hint: Really work on those elements that are powerful and resonate with prospects.

usp - unique selling proposition.

basic business elements (competitors)

1. Coach businesses on how to run their business effectively.
2. Coach people on their careers in business.
3. Vast Business experience.
4. Testimonials from past clients & companies.

distinct elements of your business (what's different/unique?)

1. 8+ years effectively and profitably running a business.
2. Extensive business experience in retail, IT, Marketing, Advertising, Web.
3. Managed large teams of people for over 15 years.
4. Leverage calls to current/past clients to help sell high-fee clients.
5. Frequently interviewed by major news outlets who ask my opinion on business and career topics.

usp - unique selling proposition.

basic business elements
(competitors)

1.

2.

3.

4.

5.

distinct elements of your business
(what's different/unique?)

plan • act • succeed

INWARD ANALYSIS

“Men are born soft and supple; dead, they are stiff and hard. Plants are born tender and pliant; dead, they are brittle and dry. Thus whoever is stiff and inflexible is a disciple of death. Whoever is soft and yielding is a disciple of life. The hard and stiff will be broken. The soft and supple will prevail.”

- Lao-tzu

swot - strengths, weaknesses, opportunities, threats.

SWOT? What's a SWOT?

Intro:

A SWOT is probably one of the most important tools you can use to quickly and easily define your business in relation to your marketplace (customers, competitors, etc.).

The SWOT model is credited to Albert Humphrey, who led a research project at Stanford University in the 1960s and 1970s using data from Fortune 500 companies.

Today, it is used by large and small businesses worldwide to help them define strategies and understand their obstacles.

Application:

I've used this tool with many of my clients to help them clearly understand where their innate strengths lie, what weaknesses are holding them back, what opportunities are on the horizon, and what threats to keep their eyes on.

One of my clients took this tool after we completed it (it should take no more than 1-2 hours to fully complete) and developed their brochure (strengths), action plan (weaknesses and opportunities) and long-term strategy (threats).

The key is that in two pages, a user can focus in on those elements that impact their business. In addition, they are easily transferrable to any action plan.

The original model is more complex, but I have simplified it considerably to allow for more "right brain" thinking.

How To Use:

Fill in each area with 5-10 short bulleted items:

Strengths:

What abilities, experience, or talents make you and your business great? How do you attract clients/customers?

Weaknesses:

What impediments, obstacles, or people hold you or your business from success?

Opportunities:

What doors are open to you right now? What connections, businesses, market changes, customers, or influences have altered your business environment?

Threats:

What trends are on the horizon? What are your competitors doing? What regulations are in the cards?

swot - strengths, weaknesses, opportunities, threats.

strengths

1. Good communicator.
2. Empathetic.
3. Reasonable task-master.
4. Knowledgeable.
5. Able to network instantly.
6. Large contact list of friends, colleagues, and family.
7. Goal driven.
8. Remains flexible, not afraid of change.
9. Steps out of comfort zones frequently.
10. Tries to truly help people.

Strengths are your marketing copy, your elevator speech, your sunshine file that you look at and admire when you are down.

weaknesses

1. Sometimes too empathetic.
2. Illogical business practices frustrate easily.
3. Seeks perfection - too slow to act sometimes.
4. Too nice to customers.
5. Not too swift with details - especially financials.
6. Jumps into things - sometimes doesn't think.
7. Market drops quickly affect business revenue.

Weaknesses deliver elements for your action plan - tangible things for you to attack during the year.

swot - strengths, weaknesses, opportunities, threats.

opportunities

1. Package offerings in new, innovative ways to entice more clients.
2. Track business closely, what is working, what is not.
3. Increase networking to reach out to new demographics.
4. Focus more on corporate careers and less on business entrepreneurs.
5. Increase communication to clients and prospects.

Opportunities also deliver positive elements for your action plan - tangible things for you to attack during the year.

threats

1. Coaching franchises.
2. Increase of coaching in CT area.
3. Coaching might morph into another form and I will not act fast enough.
4. Economic downturns significantly affect my revenue goals.

Threats allow you to keep your eye on the future and anticipate major changes in your vocation.

swot - strengths, weaknesses, opportunities, threats.

strengths

weaknesses

swot - strengths, weaknesses, opportunities, threats.

opportunities

threats

(plan ● act ● succeed) CUSTOMERS

“Accept that some days you're the pigeon,
and some days you're the statue.”

- Scott Adams

target customers

Isn't everyone my target customer?

Intro:

Maybe. But probably not.

Say you own a dry cleaner and almost everyone uses a dry cleaner. So you would surmise that everyone is your customer. You then use broadcast advertising to reach "everyone".

Here's the truth: Some customers are better than others. They pay more, they use more services, they are easier to work with, they recommend your services - some element that differentiates them from the others.

Those elements allow you to segment them from the rest and focus extra business on them - the ROI will be exponential.

For what it's worth - our approach has been to focus on these clients first, but widen the search if/when times are slow.

Application:

Many small business (and large businesses too) don't know who their key target customers are.

This was the case with one of my clients - they networked and connected with anyone - in essence, physically broadcasting their services and getting clients. But that can only work for so long.

We then developed a list of key clients, defined their characteristics, and then developed a plan to reach out to them.

Not only did the business prosper, but it grew with those clients that paid higher fees, are easier to work with, and use more services. In addition, she culled those problem clients and made doing business that much more fun!

Now my client regularly reviews her client mix and actively targets those prospects that mirror her best customers.

How To Use:

First Column: describe your best customers - it could be based on any criteria - but focus on the those customers that pay well, are easy to work with, or really deliver what you are looking for in a client experience.

Be honest - don't make up fake or mythical customers - take stock and describe those elements of each customer or client.

For example, call the first target customer: Rich & Happy. Then describe them: high income, never focuses on the price, does focus on quality, female, age 35-55, Metro NYC area.

Second & Third columns: Explain Why are they your best customer and Where you can find/attract them. This will give you actionable directions on how to select, reach, and procure your key clients that make your business hum and your heart sing.

target customers

Description (who are they?)	Why (are they your target customers?)	Where (can you find them?)
<p>1. BORED EXECUTIVES Age 30-45, executives who are bored, unsatisfied by their current responsibilities and crave change. Male or Female.</p>	<p>1. They need someone to help them strategize, plan, set activities/tasks and keep them accountable while still working.</p>	<p>1. In companies, at chamber events, charity events, industry events, conventions, workshops.</p>
<p>2. STRESSED EXECUTIVES Age 40-55, high-level executives that need a sounding-board for ideas, a confidant/partner to help them with the daily pressures of their position. Male or Female.</p>	<p>2. They are all alone in their position with really no one to talk to that doesn't have an agenda. They need a coach to decompress and assess which areas need their attention and others that do not.</p>	<p>2. Charity events, workshops, golf course, membership clubs, with other high-level executives.</p>
<p>3. HARRIED BUSINESSPEOPLE Age 35-50. Business owners who don't know where to turn to increase their business, their client base AND have a hard time focusing on what is important and what isn't. Male or Female.</p>	<p>3. Running your own business is not a paint-by-numbers exercise. You are required to make many decisions that affect your services. You also need to remain flexible to changes in the marketplace and try new things. Having a coach will allow you to keep a fresh perspective and help with all of the distractions running a business throws at you.</p>	<p>3. Chamber, Rotary, BNI, clubs, events, etc.</p>

target customers

Description
(who are they?)

Why

(are they your target customers?)

Where

(can you find them?)

1.

2.

3.

marketing strategies

Why isn't my marketing working?

Intro:

Have you spent a lot of money and time on your marketing and advertising plan/budget with little to show for it?

A lot of businesses think that if they spend a lot of money and time on marketing their business that the money will just roll in.

Unfortunately, that really isn't the case.

In fact, you can find yourself deep into debt financing a “marketing scheme” based upon areas that do not work for your business but are the “standard” advertising avenues.

This model allows you to not only view how much effort you expend on each marketing initiative, but also to gauge its impact on your business.

EXAMPLES: Networking, Public Speaking, Press Releases, Interviews, Billboards, TV, Radio, Direct Mail, Knocking On Doors, Cold Calling, Business Cards, Brochures, Chamber of Commerce, Clubs, Publicists, Newspaper, etc.

Application:

One of my long term clients related his experience with a marketing firm that had previously developed a six-figure marketing plan to grow his business.

Through direct mail and with beautiful brochures and cards, they mailed the better part of the county to promote his business.

He received one call.

He then reviewed all of his marketing practices (including networking, web site, workshops, referrals, etc.) and aligned them on the following marketing strategy grid. He found that many of them took lots of effort and delivered no impact.

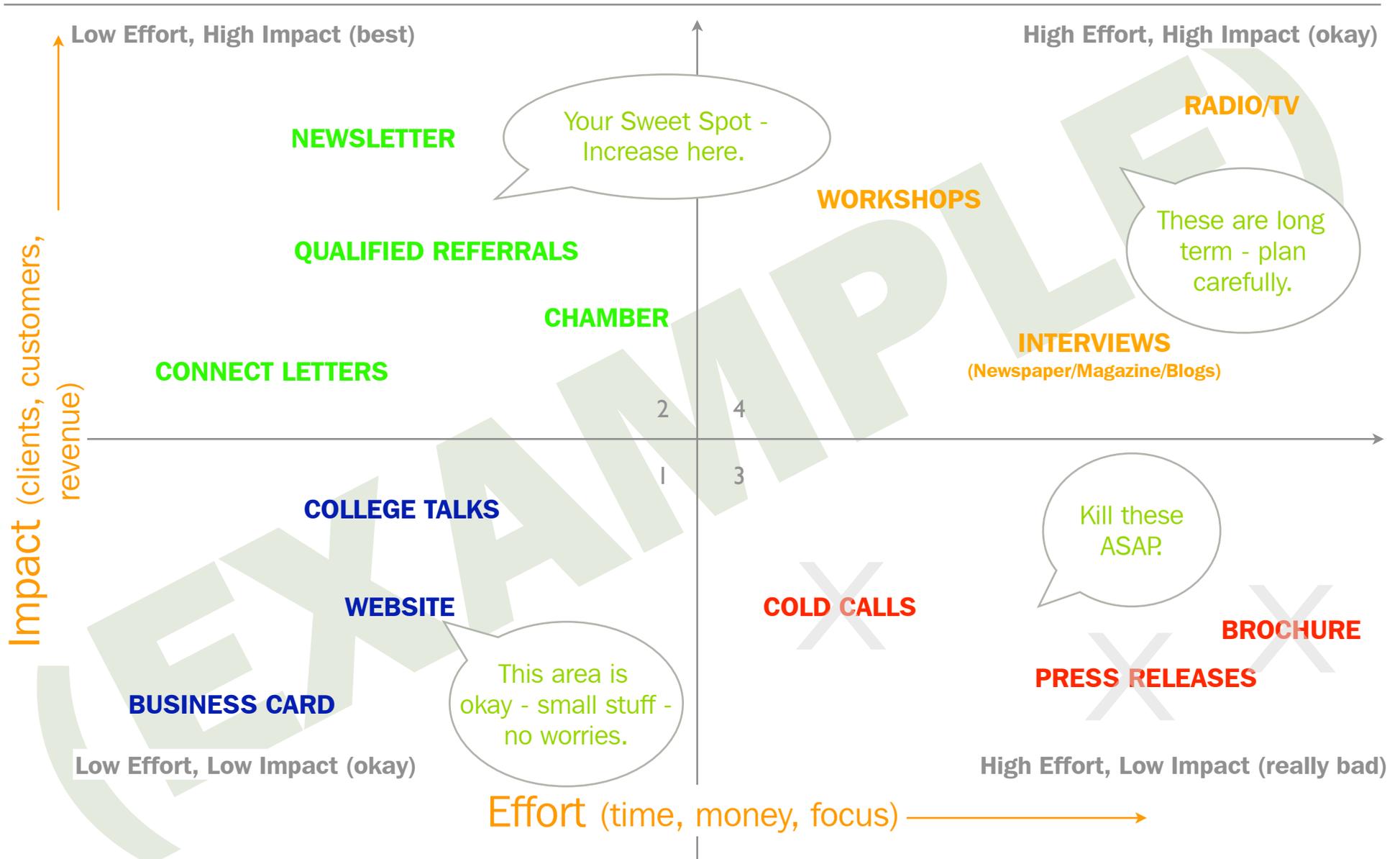
So he radically changed his plan and focused on avenues that delivered the intended impact with minimal effort.

How To Use:

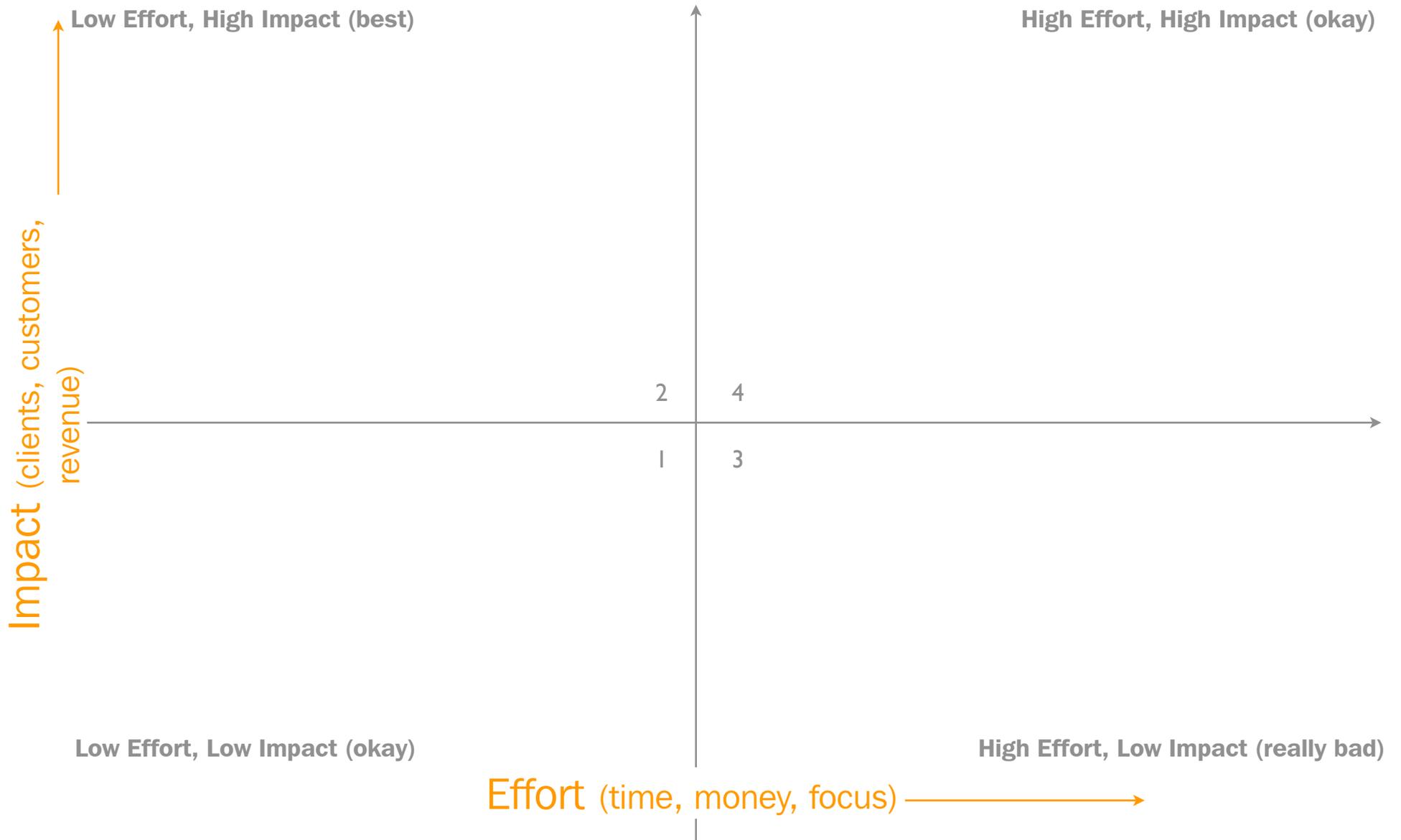
Take each marketing strategy (see some suggestions below) and plot them on the grid:

1. Low Effort, Low Impact - what things do you do that are easy, take really no time, resources, or money to deliver a little impact to your client/prospect base?
2. Low Effort, High Impact - this is your sweet spot - what actions take little time and deliver increased revenue and build your client base?
3. High Effort, Low Impact - this is bad - you spend a lot of time, effort, and money and you get very little impact. Stop these efforts and focus more time on your Low Effort, High Impact area.
4. High Effort, High Impact - these are the initiatives that take a lot of time and deliver a lot of exposure - plan carefully and monitor regularly for results.

marketing strategies



marketing strategies



sales lifespan (connect, acquire, retain, extend - the care model)

Why is no one buying? Why are my clients leaving?

Intro:

Maybe you are spending too much time getting customers/clients and not enough time retaining or extending them.

The sad fact is that at many companies, the instructions of the sales force begins and ends by connecting with key prospects and acquiring them as clients.

That's it. No focus, funds, or emphasis on retaining them (through good customer service) and extending them (selling them more stuff).

To have a well-rounded and effective sales focus, you must touch upon all four of these areas - choose your prospects wisely, acquire by closing the sale effectively, retain by giving quality customer service constantly, and extend by aligning new offerings to their anticipated needs.

If you do that, you will save gobs of money and grow your business tremendously.

Application:

The secret to the sales lifespan is to understand that it more expensive (3X or more) to choose and acquire a client than to retain and extend a customer.

It's true and is proven time and time again. I have a client who frequently developed long lists of prospects, cold called incessantly, and was out selling new clients every morning. I asked him one day, "What do you do to retain and extend your clients?" or in other words, "When do you know when clients will defect and do you ever sell anything else to your client?"

He said, "Well, I never thought of that - clients do go away frequently . . ."

So we sat down, used this tool, and developed a sales lifespan process for his business that he still uses today.

How To Use:

Choose: Who is your target customer? What are the qualities of your perfect client? How do you reach them? How can you attract them to your business?

Acquire: What is your sales technique? How do you align your services/product to your prospect's needs? How do you close the sale and get them to sign?

Retain: How do you hold onto current clients? What extra services/offers can you promote? What defection triggers do your clients engage - how will you know when they will leave? How can you ameliorate them? How can you step up customer service? How can you develop a robust two-way communication process with your clients?

Extend: Once they are sold, what else can you sell them? What sales road map can you develop to slowly capture more and more of your client's business? When, where and how do you get their attention?

sales lifespan (connect, acquire, retain, extend - the care model)

connect

Target Customers:

1. **BORED EXECUTIVES**
Qualities: Unhappy at work, don't like their boss/responsibilities, passed over for promotion.
2. **STRESSED EXECUTIVES**
Qualities: Bad Work/Life balance, too little time, crazy schedule, too many meetings, colleagues disaffected.
3. **HARRIED BUSINESSPEOPLE**
Qualities: Rushed, can't focus, always worried, jump from one strategy to the next.

acquire

Sales Technique:

1. Use flexible elevator speech, work to help them and not sell myself.
2. Leverage promotion in WSJ, NY Times, and CNN in all communication.
3. Give them energy - show them enthusiasm and energize them.
4. Offer a complementary session - let them experience coaching.
5. Close the sales process by communicating fees and asking "How does that sound to you?"

retain

Hold Onto Clients:

1. Offer "retainer" services - I am available anytime to them for emergencies.
2. Provide free, in-person SWOT analysis.
3. Email an "End of the Week" article to clients, based on Life Issues.
4. Stay in contact and keep session calendar up-to-date.
5. Develop 'tipping-point' scenarios to anticipate client churn.
6. Develop regular "post mortem" reports to review and understand why clients have left my coaching.

extend

Sell More Stuff:

1. Use these books to help them action plan their business.
2. Look into Mastermind teleconferences within like clients.
3. Retreats?
4. Longer sessions? Shorter sessions?
5. Deep dive into a trouble area - additional cost.

sales lifespan (connect, acquire, retain, extend - the care model)

connect

acquire

retain

extend

(plan ● act ● succeed) MONEY

“People think that what a business does is make money.
But money is just the intermediate stage
-- just a shorthand -- for whatever people want.
What most business really do is make wealth.
They do something people want.”

- Paul Graham

basic financials

Can you make money if you don't set targets?

Intro:

You need to keep good financial books. And you need to set a lot of complex financial targets.

But a lot of business people forget to focus on two simple measures that drive a lot of their business and those behaviors that increase their business.

First is the Client Vs. Annual Revenue ratio. Some business people never state what they really want to make in 2008. In addition, how many clients can they actually sell and service. Sometimes one or both targets are unrealistic.

Second is the Revenue breakdown. How much do you want to make in 2008 and then extrapolate it out to an hourly rate.

Why? You will then have an incredible metric that will allow you to constantly monitor all of your activities, ensuring that you are making at least that number.

Application:

Many of my clients have been in business for many years AND have a financial advisor helping them balance the books and pay taxes. But when I ask them a few questions like:

“What is your hourly SALARY?”

“What do you really want to make in 2008?”

“How many clients do you really want in 2008?”

They stumble and stutter.

This tool allows them to quickly estimate and understand some basic measurements to allow them to track their success throughout the year. They can measure, monitor, and adjust as necessary without using a slide rule or complex set of stat books.

All on ONE page. Simple.

How To Use:

Client Vs. Annual Revenue: Start at either end and work to the center. How much do you want to make in 2008? How many clients can you reasonably serve? Divide D by A and you get $B = \text{Average sale by client}$. Is this a rational number? If not, you need to lower D or raise A, it's that simple. Then divide both A & D by 12 = Monthly revenue and Monthly Client Base. How do those look? Realistic? Attainable?

Revenue Breakdown: Start on the left and copy the Total Year Revenue (TYR) from the top. Now divide that number by 12. This is your Monthly Revenue target. Divide TYR by 52 and get your Weekly Revenue target. Then divide your Weekly Revenue by 5 business days. Finally, divide the Daily Revenue by 8 hours to get your Hourly Revenue.

You can also compare last year's numbers to this year's projections - just draw a line down each column and list “LY and CY”.

basic financials

How Many Clients?

A

50 clients

Is this too many?
Too few?
Modify based on D.

Average Fee/Sale

B

$\$200K/50 \text{ clients} =$
 $\$4000/\text{year}$
 $\$333/\text{month}$

This is crucial -
Is this too much to
charge your clients?

Frequency/Month?

C

$4x \text{ Month}$
 $\$333/4x =$
 $\$83.25 \text{ per interaction}$

Now we get down to
key revenue figures.

Total Year Revenue

D

$\$200,000$

Is this too much?
Too little?
Modify based on B.

Monthly Revenue

$\$200K/12 \text{ months} =$
 $\$16,666/\text{month}$

Remember, this is gross -
taxes and costs!

Weekly Revenue

$\$200K/50 \text{ weeks} =$
 $\$4000/\text{week}$

2 weeks off for
vacation.

Daily Revenue

$\$4000/5 \text{ days} =$
 $\$800/\text{day}$

Where did the day go?
Where did $\$800$ go?

Hourly Revenue

$\$800/8 \text{ hours} =$
 $\$100/\text{hr}$

This is the magic
number - use this
figure for everything
you do. Is what I am
doing worth $\$100/\text{hr}$?

basic financials

How Many Clients?

A

Average Fee/Sale

B

Frequency/Month?

C

Total Year Revenue

D

Monthly Revenue

Weekly Revenue

Daily Revenue

Hourly Revenue

(plan ● act ● succeed) BRANCHING OUT

“There are four ways, and only four ways, in which we have contact with the world. We are evaluated and classified by these four contacts: what we do, how we look, what we say, and how we say it. ”

- Dale Carnegie

“connecting” opportunities.

Meeting People = More Business. It's that simple.

Intro:

Okay, enough about financials. Let's talk about how we can expand our business instantly by just meeting people and making friends.

Unfortunately, when you're in business, you seldom have time for networking, connecting, and making new friends. This is crucial - you need to get out of your self-imposed cocoon, start shaking hands, and passing out business cards every day.

You never know when you will meet your next best friend, your next great manager, your number one client. And that will never happen in your office. You need to put together a strategy to informally and formally meet business people from all vocations and walks of life to spread your message.

This tool ensures that you plan and develop regularity and frequency with your networking.

Application:

Here's one of my best client stories:

My client, who runs a painting business, was walking out of a hardware store and passed by someone he thought he knew. Now he had two choices, keep walking or say something - so he said, "Do I know you?"

Not only did that person know him, he used to work for my client 12 years ago! The man is now a high-end contractor who has a number of luxury building sites.

A little more talking and my client is offered to make a bid on one of his sites. One thing leads to another - they accept his bid of \$160,000 for painting (it's a huge estate).

Now he could have just walked by this man. But he stepped out of his "business cocoon" and made \$160K.

How To Use:

This tool is comprised of two areas - personally- and organizationally-executed connecting:

Personally Executed: List 4-5 personal locations or situations where you can connect with prospects. Child's sports, the salon/barber, train, and religious institutions are all great places to start. Don't forget to list the frequency. When done, add them to your weekly schedule.

Organizationally Executed: Again, list 4-5 organizations where you can connect with prospects. The Chamber, BNI, LeTip, Rotary, past classmates/colleagues, LinkedIn are all great places to start. Don't forget to list the frequency. When done, add them to your weekly schedule.

Getting them down on paper and then scheduling them regularly into your week will immediately increase your contact with potential clients and spread your business' message.

“connecting” opportunities.

personally executed	frequency	organizationally executed	frequency
1. Jane Smart Letters & follow up calls.	Weekly	1. Business Networking International	Weekly
2. Lunch appointments with past colleagues, friends and family.	2-3 a month	2. Chamber of Commerce	2-3 events a month
3. Attending charity events - donating services for silent auction.	Quarterly	3. Entrepreneurial Women's Network	2-3 events a month
4. Reaching out to people at events, kids sports, train stations, and other times where we have time to kill.	Ad-hoc	4. Publicist	2-3 articles a month

“connecting” opportunities.

personally executed

frequency

organizationally executed

frequency

1.

2.

3.

4.

5.

my flexible elevator speech.

What do I say to a prospective client/customer?

Intro:

One of the hardest things I ask my clients to do is to get out, meet people, and sell their services.

“But I feel like a used-car salesman!” they say. “I don’t want to try to interest people in my services when they don’t want them!”

Well - that is far from what I want. I usually say, “All I want you to do is to first LISTEN to them.”

“Understand where they are coming from, how they do their business, what their NEEDS are.” I say. “Keep asking questions - show interest - and understand how YOU can help them.”

At that point you have the knowledge to position your product or service and align it with their needs when you explain it to them.

Application:

Many of my clients have trouble presenting their product or service without sounding like a used-car salesman.

I teach them this two-step speech and they suddenly find out that they not only are more engaged about explaining it to anyone they meet, the people they are connecting with are more engaged. Why?

My clients actually mold their product/offering into that person’s needs.

It’s that easy. And when that happens, that person begins to really listen to my client and actively shaking their head approvingly because my client is subtly touching upon each of their needs.

When I first walk my clients through this process, they say that it is too transparent, and anyone will see right through it.

It never happens.

How To Use:

Step 1: Listen, listen, listen. Ask questions. Lather. Rinse. Repeat. When listening look for opportunities to align what you do with their needs. Look for keywords that you frequently run into when you offer your services.

Step 2: When you are finally asked what you do - engage the questions: “You know how . . . “ and then take all of your ‘listening’ elements and weave them into a very short story (30-45 seconds tops).

Then answer your own question with “Well, I . . .” - you then apply your product/service to the story that you just presented and show that you can solve their needs.

What happens is that you engage your new friend immediately, your elevator speech is not rote and dull, and you hook them in by portraying your product/service in a new and exciting light.

my flexible elevator speech.

“You know how . . . “

. . . business owners are frequently worried if their business will drop off or if they suddenly lose a major client? Add to that the inherent day-to-day pressures of managing a team, financials, scheduling, disruptions and you have a stressful mix growing exponentially.

“Well, I . . .”

. . . help those business owners to shine a light on their business by tracking past performance and keeping a focus on current changes in the market. In addition, we work together as a team to prioritize what is important and what's not and develop an action plan to ameliorate those stressors.

my flexible elevator speech.

“You know how . . . “

“Well, I . . . ”

(plan ● act ● succeed)

TAKING ACTION

“When written in Chinese, the word 'crisis' is composed of two characters - one represents danger, and the other represents opportunity.”

- John F. Kennedy

my action plan.

Let's make this happen!

Intro:

Here's the best and most important part of the book!

This is where you take all of your information, learnings, and epiphanies to deliver three concrete action steps for the year.

Application:

Candidly, I require ALL of my clients to execute an action plan for each year. It's a great way to track, monitor, modify, and attain their goals (see Tool #1) during the year.

Many clients that come to me are troubled that their business is off-track or they are scared that they are not monitoring it effectively - in essence, they are working in a black hole.

This final tool easily produces a road map based upon clear facts and helps them navigate the treacherous client/customer waters that we all travel every day.

But instead of a ship that is venturing off the edge of the earth, it is a sailboat that requires subtle modification to react to constant changes in the business weather.

How To Use:

Step 1: Take the three goals from our first tool and write them at the top of the page.

Feel free to change them based upon the other facts uncovered in this book.

Step 2: Define clear and attainable action steps to help you attain each goal. Keep them "actionable" and not "professorial".

You are not writing a tome - you are developing a road map.

A good way to do this is to begin each action step with an action verb:

- Deliver
- Meet
- Investigate
- Complete

You get the idea. Good luck!

my action plan.


signature

Package offerings in new, innovative ways to entice more clients.

1. Investigate group mastermind teams around action plan concept.
2. Look into 'timed-coaching' packages - 3, 6, 9 month groupings.
3. Understand the life-cycle of the the client - is it them, me, or a combination of both?
4. Combine workshop/coaching packages.

Broaden networking to reach out to new demographics.

1. Approach higher-income towns - chambers, charity events, etc.
2. Do more meet & greet dance cards to hone message and sell services.
3. Cull contact list and engage more colleagues via intro letters & coffee house meetings.
4. Schedule 3-5 networking opportunities a week - at least!

Increase communication to clients and prospects.

1. Hone monthly newsletter and increase readership.
2. Send a Friday article (more life coaching oriented) to current and past clients.
3. Encourage 'reach-outs' with clients on a more regular basis and with colleagues to encourage their business or referrals.
4. Step up promotional strategy for more breadth and depth in career-oriented coaching.

my action plan.

signature

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how to use this action plan moving forward.

Immediately (0-4 Weeks):

Congratulations! You're done! As with normal business plans, you tend to complete, get a transfusion of blood, and trundle along with your business. In addition, people usually take their completed (and usually bound) business plan and stick it in a drawer or on a shelf - never to be seen in the light again.

Please do not do this with your completed action plan. It should be a regularly-accessed guide that you leverage frequently to help you with your decisions, planning, problems and strategy.

A good measure is to keep this on your desk and review it every Friday morning (before work really gets into gear). Take 15-30 minutes and review what your conclusions were and see how your true direction is going.

If there is a gap, assess and chart a new direction. A good gap - see if you can push your business a bit harder. A bad gap - see where the change is and use the tools to modify your planning.

Later (1-3 months):

As you begin to check off some of your action plan items, you might want to revisit:

SWOT Analysis - what other weaknesses or opportunities can you tackle?

Financials - are you consistently trending above expectations? What is contributing to that - more clients? More business in general?

If you are not seeing the requisite performance that you planned for, revisit these areas:

Connect - are you leveraging all of these opportunities on a regular schedule?

Elevator Speech - how can you hone this to clearly communicate your message and grab new prospects?

Marketing Strategies - are you spending too much time and effort on strategies that do not deliver the planned impact?

Target Clients - Missing the target? Alter the direction.

Long-Term (3-12 months):

If things are going smoothly with your business, you can change to reviewing this plan on a monthly basis - try to look at it near the end of the month to plan for the next month.

If things are not going too smoothly, go back and revisit some of the tools mentioned in the "Later" section (the middle column on this page).

If you are going gangbusters and complete many of these items or if your business encounters a major change of direction, you might want to redo this entire action plan again.

I know that this might be a pain, but the positive part is that it probably contributed to the change in your business performance and you probably want that good mojo to continue.

Otherwise, move forward with a plan (most businesses do not do this) and attack each day with a vigor unknown in normal corporate life. Excelsior!

conclusion.

I hope you enjoyed this book.

Why? I've tried to keep these tools as simple as possible so you can take the requisite amount of time to make clear decisions pertaining to your business.

In addition - and you might have noticed - I used my own information to complete each of the 'Example' pages. This ensures that these tools do work - I'm not making this stuff up!

Finally, I want to hear from you. How you liked this book - if it has made an impact on your business - did it get you to think, plan, and act? Or did some section give you problems? I truly value your feedback - call me at 203.500.2421 or email me - feedback@planactsucceed.com.

Have an INCREDIBLE year.

Regards ·

A handwritten signature in blue ink that reads "Rich". The signature is stylized with a large, sweeping initial "R" and a long horizontal line extending to the right.

one final suggestion.

If you've gotten this far, you're probably a likely candidate for coaching. I'm so sure coaching can work for you that I'm offering a complementary coaching session to talk about your goals and dreams.

And yes, it really is an actual coaching session. You can talk about any subject, ask as many questions as you like on the issue of your choice.

Why Would I Do This?

Because the only way to really know how coaching works is to experience it firsthand.

But even if you just want the free coaching and have no intention of ever signing up, that's okay, because you may tell someone about it, and that is of tremendous value to me.

Check out my site at www.richgee.com and call me at 203.500.2421. Or email me at free@richgee.com. My staff will then contact you and schedule your session. Since I only offer two free sessions a week - act quickly - they do fill up early!

Regards -

A handwritten signature in blue ink that reads "Rich". The signature is stylized with a large, sweeping initial "R" and a cursive "ich".

(plan ● act ● succeed)

“Genius is the ability to put into effect
what is in your mind.”

- F. Scott Fitzgerald

(this is not your normal business book.)

THE BAD NEWS

You Run Your Own Business - You're Supposed To Have A Business Plan!

Unfortunately, It's Complex & Takes Time To Complete. And When Done, You File It Away, Never To Be Seen By Human Eyes Again.

THE GOOD NEWS

This Book IS Your Business Plan.

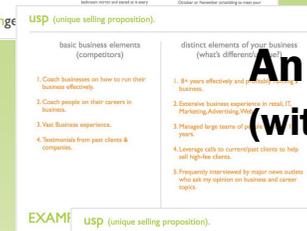
It Steals The BEST Elements Of A Business Plan & Distills Them Into TEN Easy Tools That You Can Use All Year Long.

THE REALLY GOOD NEWS

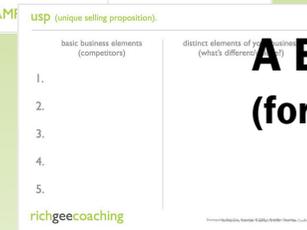
Each Tool Is Made Up Of 3 Parts:



ONE Page of Instruction



An Example Page (with real information)



A Blank Page (for you to fill out)

THAT'S IT!

NOW GO BUY THIS BOOK . . .
YOUR BUSINESS NEEDS IT.