

TIME

Not enough time

Spread too thin

Don’t delegate much

Too detailed to teach others

No one can do it as good as me

Not doing the things I know I should

Want to get out of the business

Restructure the businesses

Want to merge or be acquired

TEAM

Need more people to handle the growth

Too much work, turning down leads

Not enough qualified employees in my industry

Can’t get good people

Repetitive mistakes in delivery or quality control

Improve efficiencies in the shop or on job site

Not profitable enough

Our work is moving overseas

Employees don’t care about their work.

Employees don’t care about the business

No teamwork

No friendship or synergy

Ineffective leadership; no strong managers

No identifiable successor

Need people to help handle growth

Poor communication, coordination

No one knows what others are doing

Poor communication and overlap between departments

Relationship conflict

Communication problems

MONEY



Growing with no plan

Need guidance with a major decision

Need working capital   
Need money to upgrade technology

Lower overhead / expense

Getting deeper in debt

Lower overhead expenses

Our work isn’t profitable enough

Cash flow stinks

Find customers who can afford to do business with me

Always get beat up on price

Need to beat our competitors

Need more sales

Sales people not delivering

Economy is hurting sales

Need more sales

Want to get our name out there

Want to grow the business, improve our marketing

**Apprenticeship Plan**

Plan to identify the low-value tasks that you don’t like doing anyway and train team members to do them for you so you can focus on the things that make you money.

**Operations and Training Manual**

“How-to” manual that describes in great detail everything a person needs to know about how to do their job effectively and takes them through a focused training process.

**Time Management Plan**

Default calendar where you’ve got the most important things blocked into your calendar as an appointment with yourself that you always keep and can then be held accountable to do it.

**Comprehensive Exit Strategy**

Plan to identify the current value of the business, quickly enhance the value, develop a marketing plan to identify either internal or external prospective buyers and get the best price for the business.

**Employee Acquisition Plan**

Plan to consistently generate more than enough leads on high quality employees by deploying multiple recruitment strategies to market for employees in unconventional ways.

**Psychometric Profiling Process**

Selection process where you use psychometric profiling tools and test-drive process to screen out non-performers before they join your team and make sure you’re getting people that will deliver results.

**KPI Measurement System**

Key Performance Indicators system that measure and reports the key activities in the business so everyone knows how their efforts are either making or breaking the business.

**Lean Manufacturing Program**

Process that originated in Japanese auto assembly plants, but works for any business by rallying your team around a commitment to eliminate wasted time, movement and materials to dramatically improve efficiencies and cut production costs, allowing you to compete more effectively.

**Performance Incentive Plan**

Incentive package for your team members that motivates them to work as hard in the business as you do and care about it like it was their own.

**Strategic Plan**

Strategic plan that clarifies the vision, mission and values of the team as well as the long and short-range goals so everyone is on the same page and pulling together.

**Leadership Development Plan**

Plan to identify and intentionally develop emerging managers and leaders, incentivize their long-term commitment with a profit-sharing plan and lay the groundwork for your eventual succession.

**Team Meeting Rhythm**

Rhythm of regularly scheduled team meetings for goal setting, reporting and accountability that takes place on a daily, weekly, quarterly and annual basis.

**Organizational Plan**

Work flow system, organizational chart and job descriptions so the whole team knows what to do to keep the work moving smoothly through the business.

**Team Building System**

System for understanding personality differences and how to improve communication by understanding the psychological profile of your team members.

**Current Business Plan**

Business plan to forecast your cash flow, determine your working capital requirements, and calculate your ability to pay back debt and make a profit for investors.

**Break Even Plan**

Plan to cut costs just enough to stop bleeding while also driving sales to cover your salary and a minimum number of expense and start paying back debt.

**Revenue and Profit Budget**

Month-by-month budget to plan the amount of sales you need to cover both your salary and a minimum number of expenses so you start making a healthy profit.

**Cash Gap Plan**

Plan to quickly collect outstanding receivables, get your customers to pay on time, and improve your terms with vendors so that your bank account always has plenty of cash in it.

**USP and Guarantee**

Unique Selling Proposition and a Guarantee so that your ideal clients/customers feel compelled to do business with YOU instead of your competitors because you’re different than all the rest.

**Sales Management System**

High performance sale force by scripting their approach, coordinating their activity with the right Customer Relationship Management (CRM) software solution, measuring their activity, and tying their results to their paycheck.

**Tactical Marketing Plan**

Aggressive, measurable marketing plan to increase your leads, improve your sales conversion rate, increase your average spend per transaction and increase the transactions you get per customer every year so your profits increase exponentially.