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*PART 2 Growing Your Business*

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# WHAT ARE YOU TRYING TO BUILD?

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*PART 2 Growing Your Business*

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# 3 YEAR PLAN

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## WHAT'S ABOUT TO HAPPEN

- ▶ Review the 6 Step Planning Model
- ▶ Plan each one of your 3 Year Vision statements
- ▶ Prioritize tasks to accomplish, and a timeline for getting them done
- ▶ List the resources needed to accomplish each task

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3 YEAR PLAN: *Objectives*

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*“Plan your work and work your plan.”*

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BUSINESS WISDOM

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**SLOW DOWN!**

*Before you plan, commit to your vision*

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**WHY DO I NEED A 3 YEAR PLAN?**

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# A 3 YEAR PLAN

- ▶ Keeps you on track
- ▶ Serves as a communication tool for key stakeholders
- ▶ Allows you to clear your head

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# A QUICK TIP

As you go through the planning process, write everything down. Don't try keeping it all in your head.



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A plan is a  
**ROADMAP**  
to success.

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# THE PLANNING MODEL

## 6 Steps for Effective Planning

A hand holding a magnifying glass over a document with text. The background is a grayscale image of a hand holding a magnifying glass over a document with text. The text on the document is partially legible and includes terms like "mistura", "100% N", "200% N", "40% N", "simples 20% P.O.", "tríplo (16% P.O.)", "monio (29% N)", "iacal (40% N)", "stura 6-10-10", "Crador", "K.O)", "tríplo", "múltiplas partes qu", "Tuencia", "A", "mo do", "ulas. A", "m".

**DEFINITION:** A STEP-BY-STEP  
PROCESS FOR DOING THINGS ONE AT  
A TIME.

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**A PLAN**

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Your 3 year plan is  
real work. Let's take it

ONE STEP  
AT A TIME.

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# THE 6 STEP PLANNING MODEL

1. Define Your Plan
2. Brainstorm
3. Identify Next Steps
4. Resources
5. Organize
6. Review Your Plan

NO. 01

*Define Your Plan*

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# DEFINING YOUR PLAN

- ▶ What is the purpose of your plan?
- ▶ What is your desired end result?

# DEFINING YOUR PLAN

- ▶ What is the purpose of your plan?
- ▶ **What is your desired end result?**



What will this plan look like when it's done?

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*I have 20 hours of sales.*

*I have obtained a building permit.*



# DEFINING YOUR PLAN

- ▶ What is the purpose of your plan?
- ▶ What is your desired end result?
- ▶ What is your starting point?
- ▶ When will you finish?
- ▶ What is the name of the project?
- ▶ How and what will you measure?

# DEFINING YOUR PLAN

What metrics will indicate success or failure?

*Measure a sales plan by the number of sales made*

*Measure success in opening another store by number of stores you have open*



What is the name of the project?

**How and what will you measure?**

# DEFINING YOUR PLAN

- ▶ What is the purpose of your plan?
- ▶ What is your desired end result?
- ▶ What is your starting point?
- ▶ When will you finish?
- ▶ What is the name of the project?
- ▶ How and what will you measure?
- ▶ Who is responsible for the project?
- ▶ Who else will be working on the project?

# PURPOSE vs. END RESULT

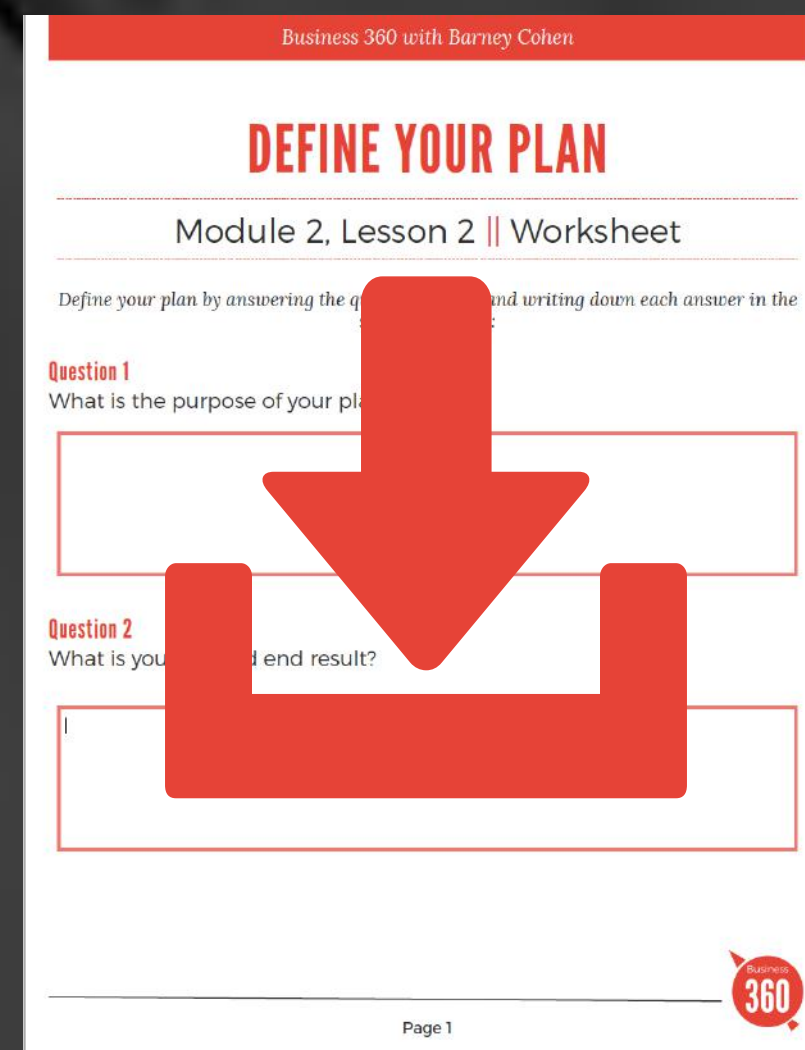
(WHY)

(SPECIFIC SPOT)

SWIPE  
FILES



Barney's Record Shop  
Define Your Plan Worksheet





# BRAINSTORMING

How to Cover Everything

NO. 02

*Brainstorm*

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*Back to Business Basics with Barney Cohen*

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**WHY DO I NEED TO BRAINSTORM FIRST?**

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# BRAINSTORMING

- ▶ Allows you to examine all the moving parts of a plan one at a time
- ▶ Gives you feedback from outside sources that provide different perspectives
- ▶ Gets your ideas out of your head and into a written form

# SLOW DOWN!

*Don't skip or rush brainstorming*



# BRAINSTORMING TIPS

- ▶ Pick the right environment for you
- ▶ Remove distractions
- ▶ Use a whiteboard, blank paper, post-its, or computer to capture ideas
- ▶ Ask a trusted friend or colleague to help
- ▶ Groups of four to five people are ideal
- ▶ Write down everything

# BRAINSTORMING STARTERS

- ▶ What are you trying to do? What's your business story?
- ▶ Describe the vision for your business
- ▶ What do you want your business to look like in three years? Ten years?
- ▶ What will it take to get there?
- ▶ Who needs to be involved?
- ▶ What needs to happen or fall into place?
- ▶ What is in your control and what is not?

**DO THE WORK**  
**MAKE IT REAL**



# Define Your Plan Worksheet

Business 360 with Barney Cohen


## DEFINE YOUR PLAN

Module 2, Lesson 2 || Worksheet

Define your plan by answering the questions and writing down each answer in the boxes.

**Question 1**  
What is the purpose of your plan?

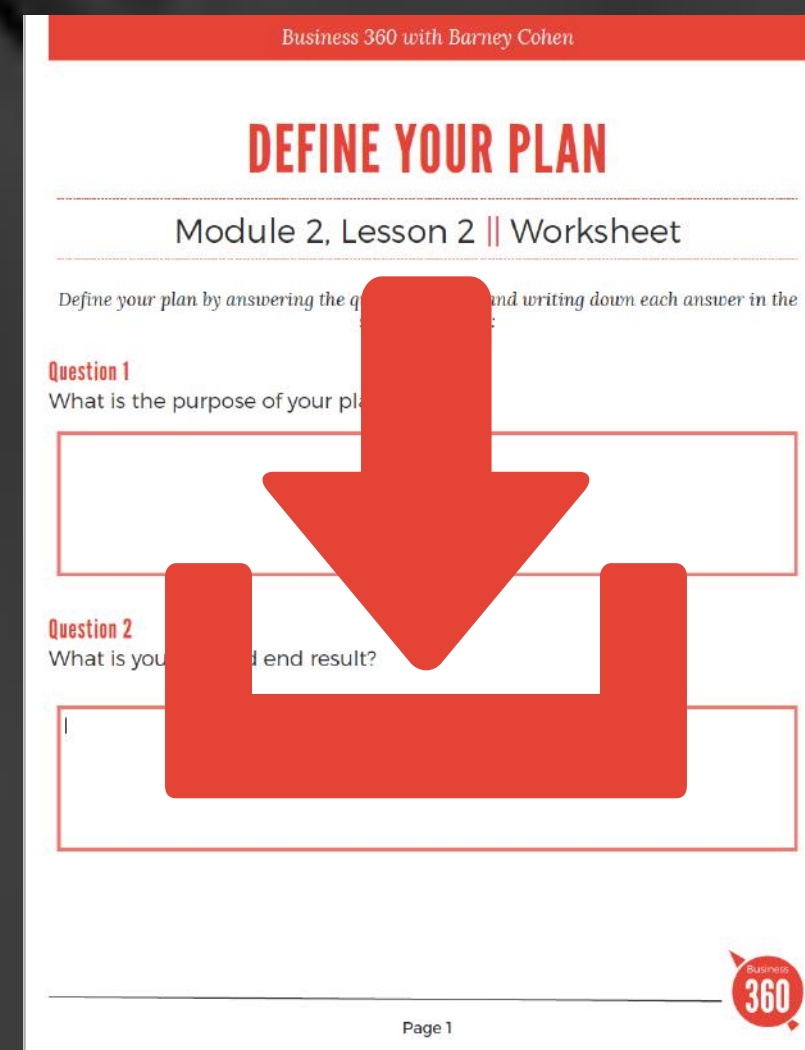
**Question 2**  
What is your end result?

Page 1 

SWIPE  
FILES



Barney's Record Shop  
Define Your Plan Worksheet





# BRAINSTORMING

How to Cover Everything



NO. 02

*Brainstorm*

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*Back to Business Basics with Barney Cohen*

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# TASKS AND PROJECTS

TASK TASK **PROJECT OR PROCESS** TASK TASK  
TASK TASK TASK TASK

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*Express all your critical factors  
as projects and tasks*



# A QUICK TIP

Critical Factors are often the things that we don't like doing or aren't good at doing. You might tend to leave these things out. Don't do that.

**DO THE WORK**  
**MAKE IT REAL**



# Creating Projects and Tasks Worksheet

Business 360 with Barney Cohen

## CREATING TASKS

Module 2, Lesson 2 || Worksheet

Towards the end of your brainstorming session, write down all of the critical factors for success in the left column. Once you have written them all down, express each critical factor as a corresponding task in the right column.

Critical Factors	Corresponding Tasks

Page 1

A large red arrow pointing downwards, overlaid on the worksheet content.



# BARNEY'S RECORD SHOP

3 YEAR PLAN *For example...*

# PRIORITIZING PROJECTS AND TASKS

A - B - C

*Health*

- A. Something the business can't live without
- B. Something that is really important
- C. Something that would be nice to have, but not necessary

1 - 2 - 3

*Time*

- 1. Something that I should have done yesterday
- 2. Something that I should do today
- 3. Something that I should do tomorrow



A1    B1    C1    A2    B2    C2    A3    B3    C3

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Writing things down is a

**MUCH  
EASIER**

way to stay organized than  
keeping things in your head.

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**DO THE WORK**  
**MAKE IT REAL**



# Prioritizing Tasks Worksheet

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## CREATING TASKS

Module 2, Lesson 2 || Worksheet

Towards the end of your brainstorming session, write down all of the critical factors for success in the left column. Once you have written them all down, express each critical factor as a corresponding task in the right column.

Critical Factors	Corresponding Tasks

Page 1

The Business 360 logo is located in the bottom right corner of the worksheet preview.

NO. 04

*Resources*

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# RESOURCES

- ▶ People
- ▶ Money
- ▶ Space
- ▶ Technology
- ▶ Time

# RESOURCES

- ▶ **People**
  - ▶ Money
  - ▶ Space
  - ▶ Technology
  - ▶ Time
- 
- Do you have enough people to do the work?*
- Do you have enough knowledge to do the work?*
- Do you have enough expertise to do the work?*

# RESOURCES

✓ People

✗ Money ..... → *“How do I get this resource?”*

✓ Space

✓ Technology

✓ Time

**DO THE WORK**  
**MAKE IT REAL**



# Identifying Resources Worksheet

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## Identifying Resources

Module 2, Lesson 2 || Worksheet

Now that you have a prioritized task list, use the "Prioritize Your Tasks" pdf to get your prioritized list if you haven't already. Identify the resources that you will need to accomplish each task. Consider:

1. **People** (who will you need to complete this task?)
2. **Money** (how much money do you need to complete this task?)
3. **Space/Location** (do you need a specific space/location to complete this task?)
4. **Technology** (what kind of technology do you need to utilize to complete this task?)
5. **Time** (how much time do you need to complete this task?)

**Task:** \_\_\_\_\_

**Resources needed:**


**People:** \_\_\_\_\_

**Money:** \_\_\_\_\_

**Space/Location:** \_\_\_\_\_

**Technology:** \_\_\_\_\_

**Time:** \_\_\_\_\_

Page 1 

NO. 05

*Organize*

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# ORGANIZATION TOOLS OF THE TRADE

1. Calendar
2. Folders

*These can be physical or digital,  
use what works for you.*



# ORGANIZE YOUR PROJECTS AND TASKS

- ▶ Organize your projects and tasks into a task list for each plan
- ▶ Organize your “plans” into sequential order as best you can
- ▶ Choose a start date and an end date for each plan

# A QUICK TIP

Don't be afraid to change your timeline for a project if it takes longer or shorter than you thought. This is a working plan and can change as circumstances change.



NO. 06

*Review Your Plan*

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# THE PURPOSE OF REVIEWING YOUR PLAN



- ▶ Give yourself confidence that you are making progress
- ▶ Encourages you to update the plan and keep it current
- ▶ Allows you to communicate to your team that progress is being made

*“A simple review is to see that at the end of the day, you’ve checked off each of the things that needed to be done that day.”*

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THE BUSINESS TUNE-UP

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**BIG IDEA**

# DO THE RIGHT FIRST THING FIRST

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# SLOW DOWN!

*Stop to check that you are making the  
progress you need*



*Your review includes  
checking that delegated  
tasks have been completed.*

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**3 YEAR PLAN**

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## WHAT JUST HAPPENED

- ▶ You've learned my 6 Step Planning Model that helps you plan each goal in your 3 Year Vision
- ▶ You've built a 3 Year Plan to support your 3 Year Vision, including a prioritized task list with timeframes and resources for each task

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3-YEAR PLAN: *Recap*

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**START NOW**  **SEE RESULTS**





**3 YEAR PLAN**

# **TIME TO IMPLEMENT**

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# SUGGESTED READINGS

- ▶ **Business Plans for Dummies**  
by Paul Tiffany and Steven D. Peterson
- ▶ **Definitive Business Plan: The fast track to Intelligent Planning for Executives and Entrepreneurs**  
by Richard Stutley
- ▶ **The Plan as You Go Business Plan**  
by Tim Berry
- ▶ **Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers**  
by Alexander Osterwalder and Yves Pigneur
- ▶ **The Tears of Autumn**  
by Charles McCarry