

# Business Success Checklist & Workbook

- ✓ Getting Started
- ✓ Organization
- ✓ Planning for  
the Future

# **Business Success Checklist & Workbook**

**By Jana Beeman**

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**Jana E. Beeman  
Create Your Dream Practice  
& Enchantment Unlimited  
501 W. 16<sup>th</sup> Street, La Center, WA 98629  
[www.createyourdreampractice.com](http://www.createyourdreampractice.com)  
360-263-5800**

**Please feel free to reprint this ebook in its entirety, including all contact information.**

**If you have any questions, please contact [jana@createyourdreampractice.com](mailto:jana@createyourdreampractice.com)**

This ebook is offered as a workbook to help you get started with a new business or in expanding an existing one. It is intended as a place for you to do some brainstorming and planning, and does not guarantee any kind of business result. The more you use it and return to it over time, the better your business planning will be.

# Business Success Checklist: What You Need for A Successful Business and Ongoing Business Growth

By Jana Beeman

When you're getting going in business, there are a lot of things to think about, and that can get overwhelming. So I've structured this in modules you can work through one at a time.

At the same time, it's fun to be able to see what you've accomplished, so I am including the FULL checklist here, so as you complete the various items, check them off here so you can see it all in one place.

Here's your basic startup checklist:

- Define your niche (see the Business Basics section at the end for more help)
- Decide on a business name
- Purchase a domain name and forward it to your site
- Set up an autoresponder account such as aWeber
- Create or improve your website
  - Be sure you have an opt-in box to capture email addresses
  - Set up a follow up email series people get once they sign up – should be GREAT content!
- Start a newsletter with valuable tips
- Create a blog and post to it regularly
- Create a Facebook profile or business page (I suggest both)
- Create a twitter account
- Set up a LinkedIn account
- If you intend to use video at all, set up a YouTube account in your business name
- Determine your Unique Selling Proposition – what is it that makes you different?
- Create the programs you're planning to offer (start with one and add as you go)
- Start getting out on social media, connecting with people and getting them to friend/follow you
- Start blogging with quality content
- Start asking others to post your blog content
- Optimize your website for best search engine results and submit to directories
- Submit your blog to blog directories
- Optimize your LinkedIn profile so others start looking for you
- Start building relationships with other businesses so they will offer your products to their client base and you should offer to do the same for them

So let's dive into this and get them all checked off, one thing at a time! In each module, we'll do a little thinking, a little planning and a little doing. Do them at your own pace but I suggest one module per week.

# MODULE ONE

## Planning Your Business for Success

When you're starting or growing your business, you need to really think through a series of steps that will help you move forward powerfully and with fewer missteps. Here are some places to put some time and energy before you get on with the 'to-do' lists.

1. Define your purpose –
  - a. Really get into the mind of your ideal client. Write it all down. Think about:
    - i. What are their issues?
    - ii. What are their solutions?
    - iii. What do they need and what do they want? – remember, you always want to sell to what they want, not what they need! Remember that your business is all about your customer, not about you.
    - iv. If you are on a mission, state that. This is something to develop for yourself and those who may eventually work with you, and helps to keep staff motivated and on the same page.
- Define your niche
- Decide on a business name
- Purchase a domain name and forward it to your site
- Determine your Unique Selling Proposition – what is it that makes you different?

Sit down and completely answer these questions, and you'll be much clearer moving forward. Keep in mind you don't need to have all the answers right now, but the more you think about it, the more answers will emerge for you.

Why does your business exist?

What does it provide you and your clients?

What are your expectations for your business?

## Developing an Entrepreneurial Mindset

Getting started in business for the first time can be a challenge, and you will need to develop some skills and personality traits to support you in your work. You'll need to learn how to bring in new clients, give them what they want (NOT what you think they need!), gain their trust and loyalty, and serve them before, during and after the sale with great finesse. Creating that client loyalty is an essential key to getting great word of mouth advertising, the best way to gain new clients. Here are a few things to consider:

1. Always stay in integrity, do what you say you will do, and over-deliver on your promises
2. Create a culture in your business based on integrity, so that not only you, but any employees you may eventually hire will always hold your business in the highest light.
3. Give value – always. Put the needs of your client way above your need for profits.

## Business Basics

1. Decide on a business
  - a. What kind of work do you want to do?
  - b. What are you good at? What are your skills and talents?
  - c. What are you passionate about?
2. What are others doing along that line that you can do differently or improve on?

# MODULE TWO

**Focus** – Always keep your eye on the furthest point down the road you can envision.

**Create compelling and bold goals** – Constantly focus on what you want your business to look like, then create the steps to make that happen, breaking them down into achievable chunks. Find ways to make your goals into milestones that are exciting and rewarding. Redo these every few months.

Where would you like to see your business in 5 years?

What would you like it to look like in 2 years?

What's your picture 1 year from now?

What will you need to do to accomplish that?

Chunk that down into steps and schedule them into your day planner.

- Set up an autoresponder account such as aWeber
- Create or improve your website
  - Be sure you have an opt-in box to capture email addresses
  - Set up a follow up email series people get once they sign up – should be GREAT content!
- Create a Facebook profile or business page (I suggest both)
- Create a twitter account

How will you know when your business is living up to your expectations?

How are you planning to grow in the business?

How are you planning to grow the business bigger? Yes, this is a different question 😊

What is your vision for your business a year from now? Financial, reach, clients, impact...

What about in 5 years?

Ten years?

## **Developing an Entrepreneurial Mindset**

1. Treat not only your customers but your colleagues and employees like gold – they ARE.
2. Always continue learning and growing, deepening your knowledge and get coaching support for yourself. Be thinking about what you need to work on next.
3. Ask your clients, colleagues and employees for feedback and for information on what they want in order to be happy with you and your services.

## **Business Basics**

1. How can you integrate your own uniqueness into your business?
2. Can you improve on a product, presentation, content or delivery?
3. Can you offer a killer guarantee? Better results or benefits?



# MODULE THREE

Pay attention to what's happening in the marketplace, in social media and other new and evolving technology. You don't have to jump on every bandwagon, but when you see a lot of others moving in a direction, be sure you're not far behind them. Be willing to change your products and services to be current and cutting-edge.

- Start a newsletter with valuable tips
- Create a blog and post to it regularly
- Set up a LinkedIn account

Here are a few more things to think about:

What do you need to get from the business personally?

What does the business need to grow?

How are you planning to continually grow your company?

## Developing an Entrepreneurial Mindset

1. Always think a few steps ahead in your business growth. Know where you want to go next.
2. Listen to what others are doing – research your competition but don't copy them. Be willing to find ways to give more, do more, or do things differently in order to differentiate yourself and your business.
3. Always be improving your products and services.

## Business Basics

1. Is there a niche in your marketplace that needs to be filled?
2. Remember to focus on what people WANT, not what they need, and don't focus on trends – they change too fast to be a viable and sustainable business, unless you focus on meeting each change (such as a designer clothing boutique would do)

# MODULE FOUR

Step into your power as a business owner and entrepreneur. Be willing to set those bold goals, to take leaps of faith when called for, to create products with others and own your part in that. Find the strongest part of your personality to call on, to keep you moving, motivated and motivating others.

Always have coaching for yourself. You will get stuck in your own head if you don't have someone else moving you forward. Know that you will outgrow coach after coach, and that is part of the process. Have an accountability partner, and do the work they give you, and you will grow as your business does.

- If you intend to use video at all, set up a YouTube account in your business name
- Start getting out on social media, connecting with people and getting them to friend/follow you
- Start blogging with quality content
- Submit your blog to blog directories

How will you know when to step into the next phase? What landmarks will you use?

What steps will you integrate to step into the next phase?

Will you hire employees or subcontractors?

What work will you sub out and what needs to stay in-house?

Are you willing to train others to be able to do what you do?

Create a business you absolutely LOVE to work in, and you'll never have to 'work' another day in your life! "Work" that is fun, fulfilling, connected and monetarily fulfilling never feels like work!

Know and believe in what you do.

Learn everything you can about your marketplace, what your competition has or doesn't provide, and find the things your ideal client needs that they aren't getting elsewhere.

## Business Basics

Any business, whether online or offline, will need social media presence. When you don't know how to do social media, think of it as a conversation with someone, or like a date.

On your first date, you just want to get to know each other. Share things about yourself and your business, and ask lots of questions. Don't be disappointed if there are not a lot of responses. Your following will have to grow before people will start participating on your pages.

After a while, you can move on to your second date. Invite them to events, share where you're speaking, talk to them about what you do. Give them some advice. Again, ask tons of questions and give quality responses. Try adding some contests to build your following.

Later, you can do some marketing on your social media, but not for about your first 6 months to a year. You need to continue building your following, and when you do start marketing, post at least 4 – 5 times as many helpful posts without marketing for every one sales-oriented item you post.

You CAN outsource your social media, but really research any companies you use. There are all kinds of people out there with bare training and no experience, who are overcharging and doing shoddy work. Use the companies that do great social media you're seeing out there – ask the page owner who they used. Most people are happy to make a referral. Find a company with at least 3 years in business and a significant client list. Get some client contact numbers so you can call and get their impressions of the work or search the company on Epinions.com.

# MODULE FIVE

Excellence, not perfectionism – You want to be proud of any product, advertising or content that you share out with the marketplace...it has your NAME on it, after all.

Be sure what you are providing is truly excellent, but don't get into the perfectionism loop. It will NEVER be perfect, so when it's at a point where you can see sharing it with others in high integrity, it's ready.

- Optimize your website for best search engine results and submit to directories
- Optimize your LinkedIn profile so others start looking for you

How do you plan to get feedback from clients and others you work with?

How will you create new opportunities?

Where will you look for new resources and ideas?

How can you continue to grow your business?

## Business Basics

Online businesses can have a local, regional, statewide, countrywide or worldwide reach. Where would you like your business to go? Some things to consider with internet-based businesses:

You'll need a computer, internet access and a domain name

For coaching, you may want to specify that you work with English speakers

You can work from anywhere and serve people in many areas

You will need to hire or acquire technical expertise

Internet marketing can be very different from brick & mortar marketing – you will need training

Learn to discipline yourself. Schedule your day in a planner to help you stay on track. Make lists, delegate what you can, and focus your time on one task at a time. Multi-tasking is not as productive as short bursts of totally productive time.

Create daily and weekly goals, and commit to obtaining them.

# MODULE SIX

Always improve – The other side of the coin is that it's better to get out there with something that may not be exactly what you want, and improve it as you go, rather than not having a product or service to offer at all.

Change the name of the product as you make major changes to the content, and it will look like an upgrade or something new.

Be willing to raise your standards periodically, and bring your offerings up to par each time you do that. At the same time, always be improving what you know and what you do. Become a true expert in your field, one day at a time.

- Create the programs you're planning to offer (start with one and add as you go)
- Remember you can create packaged programs from live events you do
- Start asking others to post your blog content
- Start building relationships with other businesses so they will offer your products to their client base and you should offer to do the same for them

How will you structure your business so it runs well at all times?

How will you manage your time?

How will you create focus and attention to detail?

Where will you go when you need graphics, web design, or other tech assistance?

Create tips and information for potential clients as well, and deliver them regularly. Create value in your word, and your readers will eventually likely become clients as well.

## Business Basics

One huge piece of the puzzle is to surround yourself with others who are successful in their businesses, so you have people to ask for direction when you need it.

A mastermind group can be an essential part of taking the isolation out of being a solopreneur.

Other places that can be of benefit are internet marketing forums, where you can post your questions and get answers from those who've been doing it a while.

Always research your options – don't take recommendations on face value. What works for one business may not be the best fit for yours.

- Ask questions, and keep asking until you find the right solution
- Be creative – just because others do things a certain way doesn't mean you can't do it differently
- Do not get sucked into the “shiny new thing” syndrome – it will distract you and drain your bank account. Work with a coach and go with what they recommend (still doing your due diligence!). You don't need every new contraption that comes onto the marketplace – there are just too many to count, and only of use to a few people. Assume you're one of them.
- Keep looking inward, connect with your heart and follow your instincts. It's not always easy to start or grow a business, but if you decide there is no other option for you, you will get there.
- Remember no one else out there is smarter or more capable than you. They are just a bit further ahead in their journey. Don't compare yourself to others, just focus on what YOU want and aim for that.
- Get support when you need it. If you don't know where to go for a resource, ask me. I'll do my best to help 😊

Above all, read, research and keep learning and growing. You raise a business much like you raise a child – it's a process, not a destination. Know that your business will always be growing and changing, and that is how it keeps you passionate about what you do. Enjoy!