

Business Heartbeat Worksheet

1) Money Goal

How much do you want to sell in the next 90 Days?

1. What's the absolute minimum you need?

Get clear on what the business needs to give you to live & work

- Food, living costs, rent/mortgage, business expenses

2. What's the long term figure that will make the growth you want?

What's in your Big Vision?

Get clear on what you want the money for, rather than pluck figures out of the air

- Personal: Lifestyle, travel, home improvement, children's education, personal development
- Business: Money needed to re-invest into the business
- Impact: Funds to be raised for a specific project

3. Now decide your 'first draft' total figure for the next cycle.

If this is your first time doing this, it's often an emotive process. Don't try to use logic as you'll lose confidence in your intuitive 'knowing' on what's right for you.

You'll be checking if your figure stacks up against what you're able to deliver & your current prices next.

2) Number of new clients

How many new clients of each of your offers do you need to make this money?

1. Your (and your team's) availability

- Set your holidays & downtime
- How many weeks are you working?
- How many days/hours a week?
- How many hours working with/on clients?



2. Your capacity

What are you selling?

(If you aren't clear on this yet, then this may be your Pillar Project for this cycle)

How many clients/projects can you accept into each of your programmes or products each week/month/cycle to enable you to give **optimum** level of service to each one?

IMPORTANT: This is NOT about maxing out your time ... how many can you **comfortably** take on to allow space for you and your business.

Do you have more than one offer to make over the next 90 Days?

If so, split your money goal across these 2 or 3 offers.

Play The Money Game: Download the spreadsheet to help you easily calculate your sales totals as you play with different prices and number of clients/customers.

3. Have you got the right prices to meet your money goals?

Check your money goals work

No of clients x Price = Your Money Goals

Do you need to revise your charge rates?

Does 'Defining your core offer' become your next Pillar Project?

3. Number of leads

How many new leads do you need to give you this number of clients?

Multiply your client capacity per week/month/cycle by number of conversations/event attendees/email list

For example:

- To sell one client, you need to speak to 3 interested people
4 clients x 3 calls = 12 calls a month -> 3 calls a week
- To sell 10 places on your next programme, you need an email list of 1,000 interested people



4) Your Top 3 Marketing Activities

What do you need to do on a daily, weekly and/or monthly basis to get these leads & sales?

Resources to help you with your marketing

- Your Best Client: Who is your ideal customer?
- GID School: Positioning, Pricing, Packaging & Promoting
- If you are not clear on what marketing you need to do to achieve these sales targets, does this need to be your Pillar Project