

Small Business Success – *It Takes a Plan*

Goal Setting Using the One Page Business & Marketing Plan Process

Your Name/Title:

Date: 12/7/06



vision

What will the business look like in ___ years?



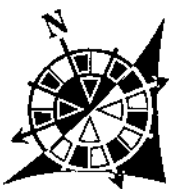
mission

Why does the business exist from the customer's point of view?



objectives

What are the specific measured goals to accomplish?



strategies

How are we going to build this company/department/activity over time?



action plans

What are the major projects and work to be done?

About Maria Marsala



When it comes to the business of business, Maria Marsala is someone you want to know! She offers a wealth of resources and cutting edge ideas that produce results. Wall Street recognized her talents - a fierce determination, out-of-the-box ideas, and drive towards high accomplishment - back in the 1970s. At a time when it was unusual to see a woman executive, she became a bond trader at age 21.

While training the sales force in the mechanics of bonds, Maria realized that she enjoyed problem solving, organizing, systems development, and efficiency – even more than trading! She wrote a series of technical articles on bonds for the sales force and later created and wrote a full-fledged operations manual. In the mid-80's Maria transferred to Operations Administration where she became the first internal consultant, increasing productivity and reducing expenses in a variety of departments. Later on, she started a business as a consultant to companies, specializing in the trading, accounting, and administration departments.

"For seventeen years, I had a wonderful, exciting, and very professional career on Wall Street. In 1990, I started a career search that ended four years later when a serious car accident forced me to "sit still" and "look inside." It was then that I created my first web site, an Internet-based business, and began helping others realize their business goals, too. The rest, as they say, is history!" -----Maria

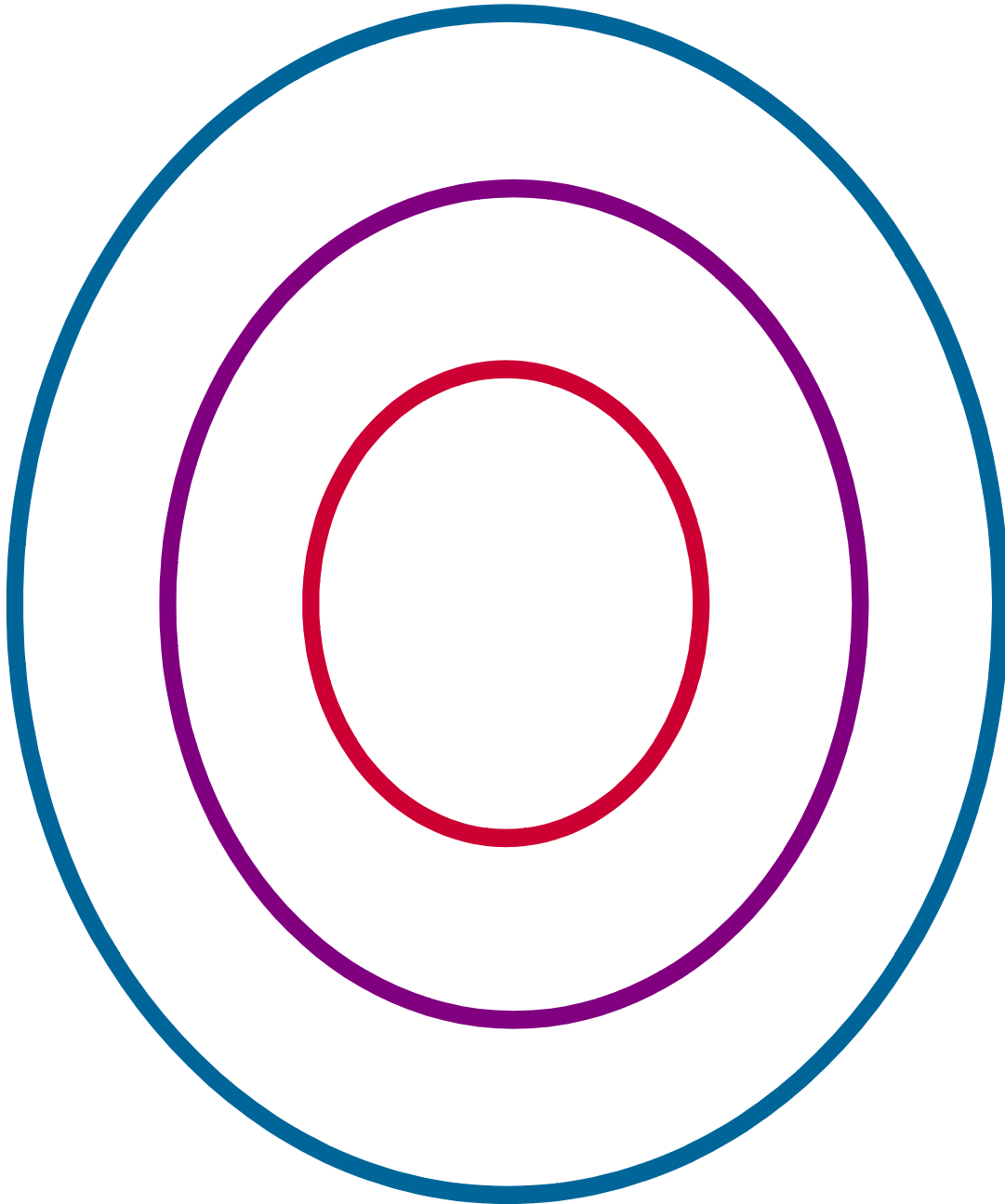
Since 1999, Maria has mentored and trained hundreds of clients to greater levels of financial and business success through her company, Elevating Your Business. Her specialty is helping financial services and technology professionals run well-oiled business machines, using processes and strategies that are simple to use, understand and execute. And once that's accomplished, the next step is the Internet, where business owners turn their knowledge into cash via the ebooks, teleseminars, CDs, etc. they create and sell.

Maria is a globally published author, national speaker, and certified teleclass leader who has appeared on numerous radio and TV shows, including her own local access show called "Accidental Business Owner." Maria is also a certified consultant for The One Page Business Plan®.

Maria Marsala



The most prosperous business owners start out with 1 ideal client to market to. Their ideal, the middle of the bull's-eye is about 85% of their client base. Your ideal client is the person you want to attract, market to, etc. Your ideal client is the person who pays you without asking lots of questions, refers you and comes back for more. Place your absolute ideal client the bull's-eye. Use the other rings of other client types. And always market directly to your ideal client. Other clients will follow, too.



Maria Marsala



Vision Statement

What will the business will look like in 1 year, 3 years, 5 years, 10 years or when you exit?

Within the next ___years grow (company name) _____ into a
_____ (adjective)

(local, regional, int'l) _____

(type of company) _____

providing (describe
products/services) _____

—

to (describe target customer) _____

with annual sales of \$ _____.

Mission Statement

Why does your business exist from the client's point of view? What does your client want from you? Federal Express mission statement can be said in one word – OVERNIGHT . (Less than 8 words)

Maria Marsala



Objectives = measurable results.

What results must your business achieve to be successful?

List five to nine goals that this business must achieve to be successful.

- Sales (Annual Dollars Volume) \$ _____
- Profit before Tax % _____
- Gross Profit percentage % _____
- Average dollar sale \$ _____
- Sales dollars per customer \$ _____

Strategies

Define how the business will be built and managed. Describe five to eight things this business must do extremely well over time to be successful.

- Positioning: Become nationally known for _____
- Revenue Model: Generate revenues by _____, _____ & _____
- Markets/Customers: Focus on _____, _____ & _____ markets
- Initial Trial: Promote initial trial of products by _____, _____ & _____
- Technology: Use technology to _____, _____, & _____

Action Plans

Work or Tasks to be completed. What are the 6 – 8 specific business building projects this business must successfully complete

- Project 1: _____
- Project 2: _____
- Project 3: _____
- Project 4: _____

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Objectives

S.M.A.R.T.

Specific

Measurable

Attainable/Achievable

Realistic/ Results-Oriented

Tangible/Time Framed

Balanced Scorecard

Financial

Processes

Client Based

Learning

Typical objective topics

Total Sales

Gross Margins

of New Clients

Production Volume

New Product Sales

Profit before tax

of Employees

Overtime Percent

Sales/employee

Ave. Sales/ Client

A/R:# of Days Sales

Safety: Lost Days

Unit sales volume

Order Accuracy

Inventory Level

Billable hours

Strategies

Strategies are a definition of how the business/department/activity will be built and managed over time.

Describe five to eight things that must be done extremely.

Staffing	Attract and retain key employees by _____, _____, & _____.
Internet	Use Internet to _____, _____, & _____.
Strategic Alliances	Use strategic alliances to _____, _____ & _____.
Infrastructure	Develop _____ infrastructure to _____.
Culture	Foster _____ culture by _____, _____ & _____.
Management Style	Develop _____ management style to _____, _____.
Change	Change _____ by _____, _____ & _____.
Exit	Exit business by _____, _____ or _____.
Workforce:	Attract and retain key employees by _____, _____,

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Nursepreneur LLC

ONE
PAGE
PLAN

Planning Unit: Owner
Fiscal Year: 2006

Ruth Dapremont, Owner

Last Updated: 04/27/2006



vision

Within the next 1 year grow Nursepreneur into an assertive 40Kg Health Training Company providing life saving training which includes Basic and Advanced Life Support, Alzheimer's and HIV AID Care, American Red Cross Family Caregiving and Workplace modules, First Aid and Medication Administration to health care providers and care givers/takers in Arkansas.

Training that prevents injury and saves lives



mission

- Win 55% of client proposals submitted 5/06.
- Use technology to streamline processes by 09/06.
- Increase average sale from \$ 0 to \$ 1500 by 10/06.
- Introduce 2 new products by 3/07
- Reduce 2005 Operating Expenses from \$ 4K to \$ 2500 by 4/07
- Achieve 4/07 sales of \$40Kg
- Earn profits in by 4/07 of \$ 25K



objectives

- Educate in the areas of safety & life saving trends/opportunities.
- Focus on health professionals, nurses, home health agencies, insurance markets.
- Core Products/Services are CPR, First Aid, Work Place Safety
- Use technology to market, streamline processes, and initiate virtual classrooms.
- 20% growth per year by adding new services, growing non-traditional markets & launching Teleclasses.
- Improve profitability by staying competitive, updating skills, and improving client service.
- Improve understanding of customers need by creating beginning and ending



strategies



action plans

- Complete Health Care Center Training Program by 5/15/06
- Train Soul Food Community in CPR by 6/1/06
- Complete Workplace Safety Training 7/10/06
- Complete web site by 9/1/06
- Launch and promote nurse assistants' support center by 10/1/06
- Train Senior in CPR/First Aid 1/1/07
- Teach 1 Caregiver class by 1/30/07
- Write 7 articles by 4/30/07

Freetrac

Planning Unit:
Fiscal Year: 2006

ONE
PAGE
PLAN



vision

Within the next year grow Freetrac Inc into a stable 250K Puget Sound Area Service and Training Company providing organization and business process support for taxes, records, advertising and chaos to construction, maintenance or property management companies.



mission

We Erase Business Messes.



objectives

- Increase average weekly sales from \$ 1200 to \$3000 by 4/30/06.
- Generate 2 initial trial programs by 6/30/06.
- Systemize the business by 9/30/06
- Increase proposals and contracts submitted 4 per year to 4 per month 3/31/07
- Increase number of consultants capable of organizing and accounting from 2 to 6 by 3/31/07.
- Achieve sales of \$250k for year-end 4/30/07



strategies

- Focus on construction, maintenance and property management
- Become known for solving financial and business process problems
- Focus on branding, professionalism, and accountability
- Promote initial trials of Planning for Profit, Best Year Yet, and the Small Business Forum Course
- Encourage repeat purchases with Welcome kit, Follow Up Processes
- Offer pricing options by the hour, the month, the job, with discounts on monthly volume
- Use technology to promote services, systematize, and follow up



action plans

- Complete tax production schedule by 2/15/06
- Launch new Website by 3/15/06
- Complete basic 100 word text for promo opportunities by 3/15/06
- Train bookkeeper in setup and troubleshooting by 3/31/06
- Schedule Planning for Profit and Best Year Yet classes by 4/30/06
- Automate Client Processes by 5/1/06
- Develop marketing plan for SBF course by 5/31/06
- Create/produce 4 articles for focus group publishing by 12/31/06

Maria Marsala

Colorado Garden Window Company



vision

Within the next 3 years grow Colorado Garden Window Company into a \$40 million national home products company specializing in manufacturing and distributing custom and replacement garden windows and skylights to baby-boomers and home remodelers.



mission

Bringing You Light, Air & the Beauty of Nature!



objectives

- Achieve sales in YEAR of \$ 17 million.
- Earn pre-tax profits in YEAR 1.5 million.
- Reduce inventory levels to 3.3 months on hand by August 31st.
- Grow Garden Window Division at 8% per year & achieve \$5.3M by 12/31
- Expand skylight/custom window product lines; grow sales to \$7.5 million by 6/31
- Implement profit improvement programs & reduce product costs to 38%.
- Achieve 98% on time delivery with 98% order accuracy by 1st quarter.



strategies

- Focus on new upscale home developments and baby-boomer remodeling trends.
- Build Colorado Garden Window Co. into a nationally recognized brand- name.
- Control quality processes by manufacturing solely in-house.
- Become vendor-of-choice by maintaining a constant inventory of standard window sizes.
- Increase capacity & manufacturing efficiency by actively reducing duplicate products.
- Centralize distribution into one location; reducing costs & improving service.



action plans

- Introduce new scenic Garden Window at S.F. products show 3/15.
- Roll out new package design beginning 3/31.
- Expand Sales Dept. to focus on Signature Homes in Denver and Provo by 4/1
- Introduce inventory reduction program company-wide by 5/1
- Fully implement new MRP software to achieve inventory reduction by 7/1
- Complete skylight product rationalization program by 8/15
- Research, design and roll out re-designed employee benefit program by 10/1
- Complete product distribution consolidation project by 11/15

Maria Marsala