

# BUSINESS PLAYBOOK



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ELEVATING THE EXIT GAME

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# BUSINESS PLAYBOOK

## Introduction:

There comes a moment to pause and critically assess our trajectory, questioning if we are indeed on the path to achieving the goals we've set for our business and personal life.

This reflective exercise is crucial, irrespective of the season or time of year. If you find yourself uncertain about the direction your business is heading, this guide is designed to help you clarify your vision and align your business strategies to achieve the lifestyle you desire for yourself and your family.

- Are you operating a business that truly serves your needs at every level?
- What actions are necessary to tailor the business to better serve our goals and facilitate scaling?

What are we renowned for in our industry? What is our signature product or service? Why do customers choose our offerings? What is our most significant limitation, and what steps can we take to enhance our financial resilience?

How do we succinctly introduce our business in a 40-second pitch?

This document aims to provide you with a comprehensive overview—a "helicopter view"—of your business life and aspirations, laying out a clear vision of success, defining why our business magnetically attracts customers, outlining the key objectives for the upcoming year, and specifying the essential team composition needed to turn these plans into reality.





## Business Overview

Business Name

Quick Summary / Business Description

Key Facts



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Have we got a business that works for 'us' on every level?

What have we got to 'do', to make it work for us? *(and to scale it)*

What is our business well known for?



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What are our company's 'signature' product or service (our "signature offerings")?	
Why do we think people want to buy our signature offerings?	
What is our company's most significant ' <i>Limitation</i> '	
What must we do to become more financially robust?	
What is our 40 second networking intro to our offering	



## MY BUSINESS ON ONE PAGE

This is a helicopter view of YOUR business life and ambitions.

**MY VISION OF WINNING IS:** - *What it looks like when we have achieved all goals*

**OUR BUSINESS IS A CUSTOMER MAGNET BECAUSE:**



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## MY MASTER PLAN FOR THE YEAR AHEAD IS: - *The objectives I must achieve*

1.

2.

3.

## MY BUSINESS STRATEGY IS: -

1.

2.

3.

## THE TEAM I NEED TO MAKE THIS ALL HAPPEN



## OUR SWOT ANALYSIS - *Describes the major points of my business.*

**Strengths**

**Weaknesses**

**Opportunities**

**Threats**





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3 PRIMARY FOCUSES	Q1 TARGET	Q2 TARGET	Q3 TARGET	Q4 TARGET
Personal income	\$	\$	\$	\$
Business profit	\$	\$	\$	\$
<b>Business turnover</b>	\$	\$	\$	\$

PRIMARY OFFERINGS	Q1 SALES TARGET	Q2 SALES TARGET	Q3 SALES TARGET	Q4 SALES TARGET
Service or Product Offering 1	\$	\$	\$	\$
Service or Product Offering 2	\$	\$	\$	\$
Service or Product Offering 3	\$	\$	\$	\$
Service or Product Offering 4	\$	\$	\$	\$
Service or Product Offering 5	\$	\$	\$	\$
Service or Product Offering 6	\$	\$	\$	\$
Service or Product Offering 7	\$	\$	\$	\$



## WHO ARE OUR COMPETITORS?

This section requires some research but its one of the best ways to discover the uniqueness of your own business.

Think about your top 3 competitors and answer the questions below. This will help you identify what makes you unique and will help you think about your business in a new way. Be honest and provide detailed answers.

### Competitor Number 1:

Questions:	Company / Details
What do they do well?	
What do they do poorly?	
What is 'unique' about their offering?	
What can they do that we can't?	

### Competitor Number 2:

Questions:	Company / Details
What do they do well?	
What do they do poorly?	



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What is 'unique' about their offering?	
What can they do that we can't?	

## Competitor Number 3:

Questions:	Company / Details
What do they do well?	
What do they do poorly?	
What is 'unique' about their offering?	
What can they do that we can't?	

Describe the perceived standards in our industry.	
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**3 reasons our customers turn to me instead of our competitors.**

1.

2.

3.

**3 ways we are genuinely different from our competitors.**

1.

2.

3.

**3 things about our service that we take for granted & our customers don't know about.**

1.

2.

3.



## WHO ARE OUR CLIENTS?

**Below is a narrative below from an IT company.** Replace it with a description of what you believe, is an accurate description of your 3 x core client types.

Client Type 2	Client Type 1	Client Type 3
<i>2 degrees to the left</i> <b>HealthCare Provider</b>	<b>An SME Business owner</b>	<i>2 degrees to the right</i> <b>Professional Services</b>
<u>Core Emotional DESIRE's</u> <ol style="list-style-type: none"><li>1. Knowledgeable of their entire network</li><li>2. Fast non-invasive installation teams</li><li>3. Cost effective.</li></ol>	<u>Core Emotional DESIRE's</u> <ol style="list-style-type: none"><li>1. An IT system that simply works each day</li><li>2. Software that seamlessly integrates across mobile and desktop devices.</li><li>3. Instant personal response to when an issue arises</li></ol>	<u>Core Emotional DESIRE's</u> <ol style="list-style-type: none"><li>1. A robust 'secure' internal network</li><li>2. Software that seamlessly integrates across mobile and desktop devices</li><li>3. Instant personal response to any issue</li><li>4. Advise on future proof hardware</li></ol>
<u>Core Emotional PAIN's</u> <ol style="list-style-type: none"><li>1. Slow connectivity</li><li>2. No onsite knowledge</li><li>3. Who to call when a problem arises?</li></ol>	<u>Core Emotional PAIN's</u> <ol style="list-style-type: none"><li>1. Slow devices that stop them working</li><li>2. Software that is clunky to use across devices.</li><li>3. waiting for help when it all glitches or stops</li></ol>	<u>Core Emotional PAIN's</u> <ol style="list-style-type: none"><li>1. Slow devices that stop them working</li><li>2. Software that is clunky to use across devices.</li><li>3. waiting for help when it all glitches or stops</li><li>4. <b>Cost!</b></li></ol>



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## Our Core Offering to them is

The company's IT personnel are slow to react or do not have the knowledge or expertise. Our team are on hand to resolve their issues.

## **Our Core Offering to them is:**

1. We learn how they use all their digital devices across the business.
2. We recalibrate their IT eco structure to be robust and fit for purpose.
3. We answer the call and get them back online fast.

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## OUR PRODUCT FLOW

The services Menu I Offer Type for each Customer

To make your services easy for a prospective customer to buy, we must have an easy-to-understand service offering. Detail below your price matrix for each specific service or product you offer and the types of clients who would benefit from buying each service.

Core Offering(s)	TYPE 1 CLIENTS	TYPE 2 CLIENTS	TYPE 3 CLIENTS
<i>E.G. Service Contracts or Product</i>	*	*	*
OFFERING 2		*	
OFFERING 3		*	*
OFFERING 4			*
OFFERING 5	*		
OFFERING 6	*		*



## OUR CORE MARKETING PLAYBOOK

To attract a constant flow of hungry clients, we must become the 'go-to' people and organisation for what it is that we do and offer to our ideal profiled clients. In order become well known to our prospective targets we must be able to answer the following 5 questions.

### WHO DO WE WANT TO ATTRACT?

1.

2.

3.

### WHAT SPECIFICALLY DO OUR CLIENTS **REALLY** WANT?





WHAT DO WE WANT THE MAJORITY OF 'NEW CLIENTS' TO BUY FROM US?

HOW OFTEN WILL WE POST CONTENT ON SOCIAL MEDIA?



WHAT WILL THE CORE NARRATIVE SAY TO THEM?

WHAT DO WE WANT CONSUMERS OF OUR CONTENT TO DO?



## OUR CORE SALES PLAYBOOK

### OUR SALES METHODOLOGY

*Describe the methodology behind why and how we communicate our brand to new employees and clients:*

### OUR SALES FOCUS

*Describe the core focus that everyone in the organisation shares to grow and flourish:*



## OUR DATABASE MINING STRATEGY

*Describe the strategy the business runs to maximise opportunities:*

## OUR SALES PROCESS

*Describe the process that all members of the team are trained in to provide clients with a first class and best in industry service:*



## OUR MARKETING PLAYBOOK

### OUR CORE MARKETING STRATEGY

*Describe the master strategy that we run to get our message in front of the eyes of our target prospects.*

### THE INDIVIDUAL ROOTES TO MARKET

*Describe each social media platform, advertising medium and type of events we utilise and the strategy for each.*



## THE KPI'S THAT MEASURE ACTIVITIES ON A MONTHLY BASIS

*Layout each of the KPI's that we record monthly to measure how effective our marketing is.*