



**START YOUR BUSINESS,
LIKE A BOSS!**

BY PAUL E WATSON

THE WINNING FOCUS
LEADERSHIP TRAINING PROGRAM
START YOUR BUSINESS, LIKE A BOSS!

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INTRODUCTION

Every year hundreds of thousands of new businesses are started. We see every kind of business, from small Mom & Pop operations, to Large Corporations. But in every industry, and in every business, the basics are the same. We sell a product and/or a service, and we have customers who buy that product and/or that service. And our goal is to make a profit.

How a business is started will determine the success or failure of that business.

This workbook was created to help you build a good foundation in starting your business. We begin with your “Reason For Going Into Business.” The reason will help us decide how much money we would like, or need to make. Also how much research we must do before we begin etc., and how much time we want to put into the business.

We must also understand the Pros and Cons of owning a business. Many times people will begin a business not realizing the difficulties that they may face in building and running the business. This in itself can determine success or failure.

Next we begin Setting Our Goals. The goals will be small stepping stones to our overall success. We begin with where we want to be in 10 years, and work backwards. Determining each step of the way where we must be to achieve the next goal. We can do this on a day by-day, week-by-week, or month-by-month basis. You are setting these goals, and you are the one who will determine the success of each goal.

Now we write the Feasibility Study if necessary, or we move directly into creating the Business Plan. This can be very detailed, or it can be a very simple Feasibility Study or Business Plan. The idea here is to lay out the steps for starting and running your business.

Following this, is the Attention To Details. Now we focus on getting our Business License, Fictitious name if necessary, other required Permits, Certifications etc. Now we look at Human Resources, Management, Marketing, etc. We want to spend some time on these areas, to make sure we don't overlook any necessary steps.

Next we must understand what it will take to become successful once your business is running. Stay focused, stick to your budget and so on.

Finally we will cover what you must do to Remain Successful. Staying Motivated, paying Attention To Details, and not losing interest in your business.

We hope this guide will be a real asset in achieving success in your new business.

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INTRODUCTION

DIFFERENT TYPES OF BUSINESSES

Landscaping	Janitorial
Housekeeping	Babysitting
Window Cleaning	Pet Sitting
Restaurant	Dress shop
Book Store	Consulting
Dry Cleaners	Real Estate
Insurance	Computer
Drafting	Roof Repair
Power Washing	Construction
Delivery Marketing	Pest Control
Auto Repair	Delivery
Jump House	Educational
Cell Phone Store	Beauty Shop
Nail Salon	Online Business
7-11 Store	Flower Shop
Bookkeeping Service	Senior Care
Employment Agency	Franchise



Bye Bye Candy

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REASONS FOR GOING INTO BUSINESS

It is very important for you to identify the true reasons for going into business. This is the foundation of your business. Ask yourself, “Why do I want to own my own business?”

1. _____
2. _____
3. _____
4. _____
5. _____

6. How much money do you need/want to make? Week, Month, Year?

7. Personal interests in business (retail, wholesale, manufacturing, etc.)?

8. Interested in labor intensive, indoor or outdoor, corporation etc.?

9. What type of business or industry?

10. Location (downtown, industrial park, work-at-home, online etc.)?

Comments _____

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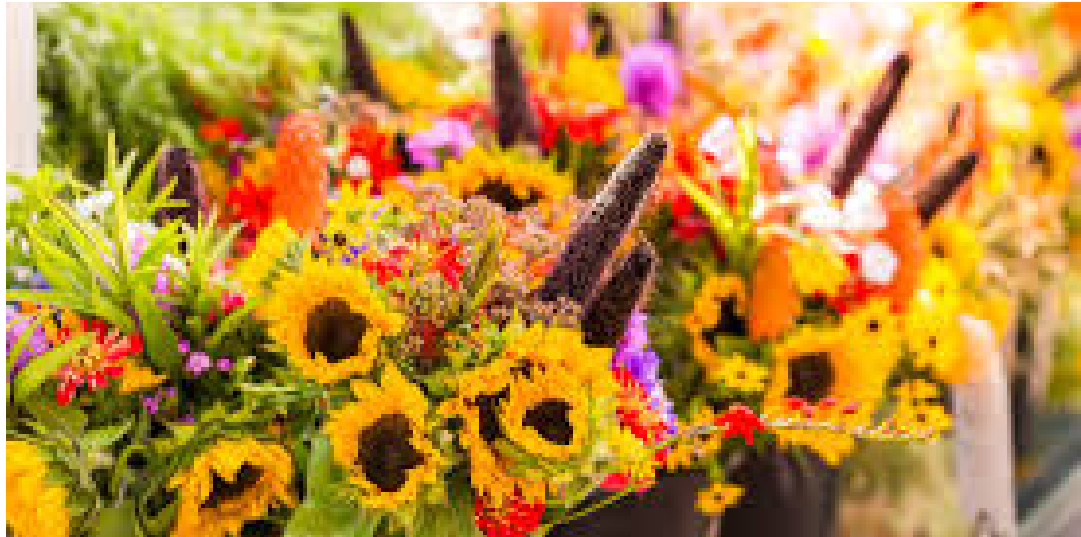
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REASONS FOR GOING INTO BUSINESS

11. How much research and study in the business have you done, and how much experience do you have in this type of business?

12. What is the biggest reason for failure in business and how will you avoid it?

Notes



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PROS & CONS OF GOING INTO BUSINESS

Pros

-
-
-
-
-

Cons

-
-
-
-
-

Notes

A photograph showing a large number of religious paintings, many depicting the Pietà, displayed on a stone wall and on the ground in front of a building. The paintings are arranged in rows, covering the wall and spilling out onto the pavement. Some are propped up on the ground, while others are hanging on the wall. The scene is set outdoors, with a stone wall and a building with a wooden roof visible in the background.

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SELF-EVALUATION

Name _____ Company _____
Type of business _____ Phone _____
Position _____ Hours worked _____
Responsibility _____
Day _____ Date _____

E – Excellent **G** – Good **S** – Satisfactory **NI** – Needs Improvement Attitude –

How is my attitude toward:

a. Myself

b. My Family

c. My Friends

d. My Job

e. My Supervisor

f. My Co-Workers

g. My Customers

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SELF-EVALUATION

h. What can I do to improve my attitude?

Appearance – How is my appearance when:

a. I'm at work

b. I'm off work

c. I'm with friends & family

What can I do to improve my appearance?

Actions – How do I act when:

a. I'm at work

b. I'm off work

c. I'm with my friends & family

What can I do to improve my actions?

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HOW TO SET GOALS

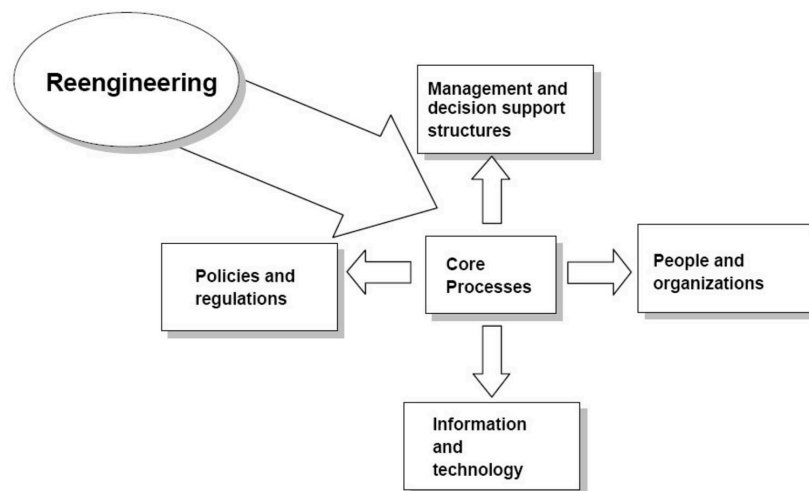
The goals form is simple, easy to use, and easy to refer to. We start with where you would like to be in 10 years. Do you want a new home? Do you want a million dollars? Would you like to have 20 business locations? Where do you want to be, and what do you want to have in 10 years?

Then fill out the part of the form that says, “5 Years.” Where must you be in 5 years to be on tract to accomplish your 10 year goal? Where do you need to be, how much money do you need to be making or how many businesses locations do you need to have, etc.?

Now fill out the section for “3 years.” Then the section for “2 Years” and then the section for “1 Year,” and finally the sections for “9 Months,” “6 Months,” “3 Months,” and finally your “1 Week,” goal.

Now spend some time on the final part. “What do you have to do on a daily basis to accomplish your 10 year goal? Make a daily list, adjust it when you need to, but make sure that each day you are doing whatever you need to do, to move forward toward that 10 year goal.

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GOALS

10 Years – Lifestyle, major achievements, home or business.

Achieved YES _____

5 Years – Where you must be to achieve 10 year goal.

Achieved YES _____

3 Years – What you must achieve to be on target for 5 year goal.

Achieved YES _____

2 Years – What you have done and are doing to reach 3 year goal.

Achieved YES _____



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GOALS

1 Year – What you have done, and what are doing to reach 2 year goal.

Achieved YES _____

9 Months – Steps to take, and planning you must do, to reach 1 year goal.

Achieved YES _____

6 Months – Routines formed for you to move in the direction of your 9 Months goal.

Achieved YES _____

3 Months – Weekly procedures formed and follow-up process to achieve your 6 month goal.

Achieved YES _____

1 Month – Routines formed and necessary steps to move in the direction of 3 Month goal.

Achieved YES _____

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GOALS

Weekly – What must be done on a weekly basis to stay focused? Phone calls, reports, etc.

Achieved YES _____

Daily – Habits that must be formed, and a daily routine set up, such as to-do lists that must be accomplished.

Achieved YES _____

Notes



FEASIBILITY STUDY



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FEASIBILITY STUDY
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FEASIBILITY STUDY

INTRODUCTION

The purpose of a Feasibility Study is to help us decide if the business we plan on starting, or buying, is a good investment. We will look at all the factors that are important to the success of a business.

Some of the items that are listed to research or review may not pertain to the business model that you are interested in. In this case, we will pass over them. However sometimes in researching one part of the industry or potential business, we discover that we need to move to another area and research and plan for that area of the business as well.

The Feasibility Study is an important preliminary aspect of discovering if the business concept you are planning is not only feasible, but is also a good investment of your time and/or money.

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FEASIBILITY STUDY

1. Create A Cover Sheet

2. Create A Table Of Contents

3. Executive Summary

Executive summary is to reflect what will be included in the feasibility study. This is an introduction to the report.

4. Business Model

We will draft the business model. We will identify how the company will generate revenue, what recurring revenue we will expect, and we will also include detail to support the financial projections.

5. Start-Up Schedule

Outline the start-up schedule of the business. This will include important events and projected dates of completion such as having financing in place, etc.

6. Product & Service Description

This describes the products and/or services of the business. This will include a physical description of the product and how it will be used by customers.

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FEASIBILITY STUDY

7. Intellectual Property

If applicable this section will describe the intellectual property that the company will develop and utilize. This should include all patents, copyrights and trademarks. This will also include any licensing agreements that have been secured for another company's intellectual material.

8. Definition Of Technology

We will describe the technology that will be used by the company. This may be technology used to produce a product, to allow a product to function, or to manage the regular operation of the company. Also include information about your research and development plans and needs to keep your company on the cutting edge of the industry.

9. Management

Here we will have a description of the management and personnel of the business. This section will be a list of titles, with or without prospective key employee names, respective duties, and responsibilities and potential salaries of these positions.

10. Production

We will describe the production requirements and the operating requirements. Include how items will be manufactured, where they will be manufactured, how items will be transported, how much space we will need to manufacture your goods, how much space we will need to contain the operational staff, how much money we plan to use for renovations and how complex it is to manufacture the product. We will disclose any information about suppliers, a description of any pre-existing contracts that we already have in place, how services will be designed, how services will be delivered to customers, and how services can be improved or modified.

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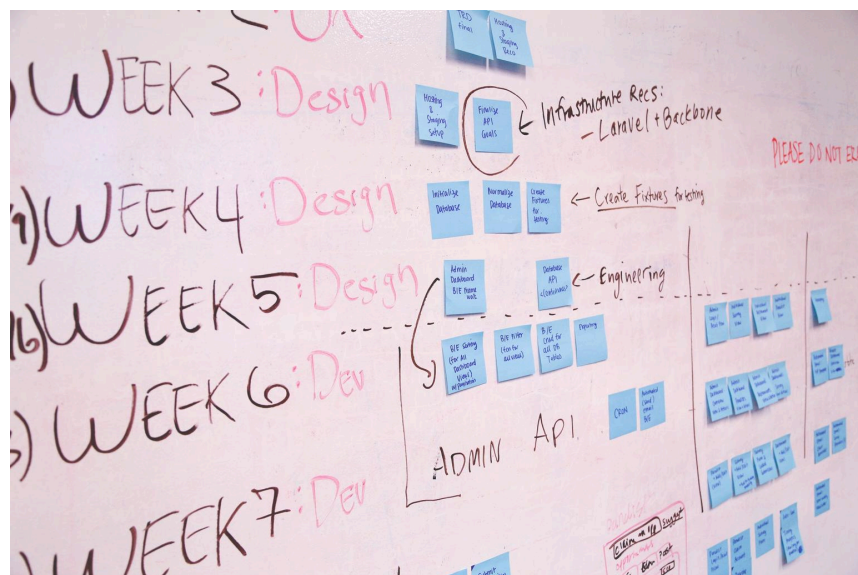
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FEASIBILITY STUDY

11. Regulations

We will describe the regulations and environmental issues that the company will need to address. This will include local, state, and federal laws that we will need to follow, as well as environmental factors, such as waste disposal plans, international trade policies etc. that we will need to take into consideration when developing, producing or delivering merchandise or services.

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FEASIBILITY STUDY

12. Target Market

We describe the market environment. This will include a description of the target market, how the customers will benefit from the products or services, what niche or need the products or services will fulfill, estimate of market size, targeted geographical area, and factors that will impact the sales volume of the products or services. This will include how frequently shoppers buy items like ours, psychographic factors, and demographic factors.

13. Marketing Strategies

We describe the marketing and sales strategy. Including information about anticipated marketing partnerships, how we will gain market access, what the basic marketing and sales strategies are, how we plan to distribute the merchandise or services, how we plan to price the products and/or services, set an amount we plan on budgeting for the first year's marketing, and identify any other factors that may influence the productivity of our proposed marketing campaign.

14. Competition

We describe the competition, making sure that we identify both direct and indirect competition. Also identify key competitors and outline their market share, business strengths, assets, goals, strategies, etc. We will list the company's potential advantages, including the uniqueness of the product, the company's assets, etc.

15. Industry

We will define the industry. We will state what the industry is, what products or services are contained within the industry, how large it is, how fast it is growing, the outlook for the industry, the industry's demands, the industry's current supply factors, and any other factors that may influence the health of the industry.

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FEASIBILITY STUDY

16. Critical Risk Factors

We will describe any critical risk factors, like economic stability and forecasts, investments, internal organization of the company, etc.

17. Capital Requirements

We will describe the capital requirements and our strategy. We will outline how much capital we need to start the business, what assets the company has in place to secure financing, what types of funding the company is looking for, the anticipated debt to equity ratio the company hopes to maintain, and when investors will be paid a return on their investment.

18. Financial Projections

In this section we will provide documentation for the financial projections. We will include the following financial reports:

Balance Sheet Projection

Cost Benefit Analysis

Income Projections for five years

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FEASIBILITY STUDY

19. Conclusion

This will outline our final findings and recommendations. We will examine the company's market viability, exit strategy viability, technical viability, economic and financial viability, business model viability and management model viability. Then make recommendations on how the start-up plan can be improved, what areas need more research and development, etc.

Notes

By _____ Date _____



BUSINESS PLAN



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BUSINESS PLAN
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BUSINESS PLAN

INTRODUCTION

The purpose of a Business Plan is to help you start a business, or to determine if a business you want to purchase is a good investment. The details of the Business Plan will be determined by the type of business, the size of the business, the profitability of the business, and the financing of the business.

A Business Plan can be very simple or it can be very detailed and complicated. This depends on many things. To begin with, you can start with a simple layout. Follow the list below, and you can make the list as simple or as detailed as you want and/or need to.

Don't be overwhelmed with the idea of creating a Business Plan. This is just like a road map that will lead you to where you want to go. First we see where we have come from, then we look at where we are, and finally we will decide on where we want to go. This road map will help us get there. The map can be a few notes on a piece of paper, or it can be dozens of pages with facts, figures, graphs and charts. Again this all depends on the type of business, the size of the business, the profitability of the business and the financing of the business.

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BUSINESS PLAN

EXECUTIVE SUMMARY

1. LOOK AT WHERE YOU HAVE BEEN
2. DETERMINE WHERE YOU ARE NOW
3. DECIDE WHERE YOU WANT TO GO

1. Where you have been. Accurate records:

- a. Personal records include: Education, Degrees, Resume, Experience, Letters of Reference, Awards, Community Service, and Accomplishments.
- b. Business records include: Business Education, Business Degrees, Business Experience, Business Accomplishments, Business References, Business Credit, and Business Research.
- c. Lay out all information and determine how you got to where you are now, from your past.

2. Where you are now. Determine what your present status is, in both personal and business:

- a. List all personal information about where you are now, addresses, phone numbers, close friends and family. Any personal information that will give a clear picture of where you are now.

Write down all business information you have. What type of business you want to have. Do you want to purchase a business, or start your own? What will the cost of business to purchase or to start? Do you have the education and training for this business?

- b. Combine the personal and business information and create a clear picture of where you are now. Answer any questions you may have about starting or purchasing your own business. Determine what you may need, to move to the next step, education, training, finances etc.

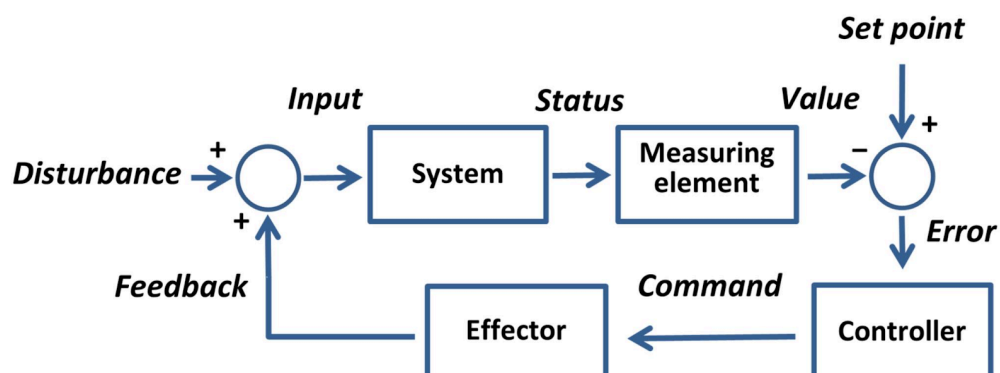
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BUSINESS PLAN

3. Where you want to go. You must have a clear picture of what you want to accomplish:
- Lay out your goals, both personal and business. Goals can be as simple as “I want to have a successful restaurant.” Or they can be as detailed as “I want to have a chain of 50 successful auto parts stores, each making a net profit of at least \$10,000 per month. Here is how I plan on achieving that goal: Step 1..... etc.
 - You must have your Personal Life in order, to achieve the goals you want in your Business. Begin by deciding what you need to do to get the Personal Education and/or Training you need to purchase or start your business.
 - Make sure you have the finances in order to purchase or start your business. If you plan on personally financing the business, put the money in a separate savings account to hold until you are ready to start your business. If you are getting financing from a bank or investors make sure you understand their requirements and that you have met those requirements.

Notes



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BUSINESS PLAN

SUMMARY

Statement of facts about the business, and summarizing important points of the plan.

1. Purpose of the plan. Why it is created, and what is the goal for the plan.

2. Type of business. Industry, Service, Manufacturing, etc.

3. Business objectives. What do you hope to accomplish with the business.

4. Ownership funds usage.

Notes



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BUSINESS PLAN

BUSINESS ACTIVITIES

Describes what the business does, its environment, and how it will succeed.

1. Organization - What is the structure of the business?

2. SWOT Analysis – (Strengths, Weaknesses, Opportunities and Threats)

a. Strengths

b. Weaknesses

c. Opportunities

d. Threats

3. Risk Assessment – What are the true threats of loss of funds, and how will you protect against them?

4. Product description – Describe your key product(s).

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BUSINESS PLAN

BUSINESS ACTIVITIES

5. Product identification – How do you identify your product(s) and differentiate it/them from the competition.

6. Pricing – What is the price or range of prices of your product(s)

Notes



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BUSINESS PLAN

INDUSTRY/BUSINESS ANALYSIS

An analysis of the current status of the industry that your business is in. It provides a basis of comparison for your business.

1. Market Analysis – Briefly describe the market within your industry.

2. Definition - Description of the economics sector that the industry occupies.

3. Industry size and growth rate.

4. Key growth factors – What the determining factors of the industry growth/decline are.

5. Analysis – What your analysis of the stability of industry is, and what you base it on.

6. Regulatory Restrictions/Business – List any restrictions in the industry that will affect your business and the success of your business if any.

7. How to anticipate and adjust to change within your industry, and the local economics.

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COMPETITION ANALYSIS

The key is to determine whether or not you can grab a share of the market and hold it. This is a review/comparison of five nearest competitors.

1. Image – What is the image and profile of your competition?

List at least 5 of your nearest competitors

2. Location – At least 5 of your nearest competitors.

3. Layout of at least 5 of your nearest competitors.

4. Products of at least 5 of your nearest competitors.

5. Services offered by at least 5 of your nearest competitors.

6. Pricing range of products of at least 5 of your nearest competitors.

7. Advertising – types, styles, general information of at least 5 of your nearest competitors.

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BUSINESS PLAN

MARKETING PLAN

Marketing is the way you will promote your business and attract customers. There are many ways to market your business for free. Creating great Word-Of-Mouth for your business, is proven the best way to market your business. Passing out fliers, business cards everywhere you go is another way to get business. Promoting discounts, specials and contests in your business are other great ways to attract customers to your business.

Join the local Chamber Of Commerce and get involved. Join different associations in your area and get involved. Offer to speak at Social Functions, on the radio and television about your industry and about your business.

Send out press releases each time there is a change or something exciting happens in your business in your industry and each time your business grows. When you promote an employee or manager or increase the staff.

Think outside the box and come up with ways to make your business stand out from your competition in your city or area.

Notes



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BUSINESS PLAN

MARKETING PLAN

1. Marketing begins within your business

2. Free and low cost ways to market your business

3. What you can do personally to market your business

Notes



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BUSINESS PLAN

MARKETING PLAN

Contains the plan to get the message about the product/service to the customer.

1. Product analysis and description

2. Description of product attributes, and why the participant will want to purchase it

3. Customer profile and target market, age, gender, etc.

4. Distribution and means of getting the product to the customer

5. Promotional scheme, ideas and methods for attracting customers to your business and to purchase your products

6. Public Presentation and means of presenting your products to customers, individually or in groups

7. Advertising: Media type, frequency, intensity

Notes

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BUSINESS PLAN

ADVERTISING

When you are doing projections, figure out a budget and stick with it for advertising. It is very easy to spend large amounts of money on advertising that will bring you little and even no results. Make sure that you do your research and make sure that where you put your hard earned money will be worth it and will bring you a good return.

This is also a good area to do as much research in as possible. Every business should advertise but each business is unique. Some advertising will work well for one type of business, but not so well for another kind of business. You must do your homework and find out what kind of advertising is best for your business.

Fairly inexpensive ways to advertise is buying little league uniforms with your name and logo on them. Put signs on your vehicle and see if your friends will put signs on their vehicles as well.

Also many businesses will do a trade for advertising for your product or service. I have traded my services for signs, newspaper ads, and I even traded for a cell phone and one time I traded for a pick-up truck. Think outside the box.

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BUSINESS PLAN
ADVERTISING

1. Newspaper classified ads

2. Newspaper display ads

3. Radio ads

4. Television ads

5. Chamber Of Commerce Newsletter ads

6. Local magazine ads

7. National newspaper and Magazine ads

8.
Sponsor little league, bowling, and softball teams

Notes

BUSINESS DETAILS

These are the details that you must establish to have a good foundation for your new business. Follow the plan to make sure that you don't miss anything.

- ## 1. Fictitious Business Name

- ## 2. Business License (City, County, State, Federal) Sales Use Tax Registration

- ### 3. Accounting / Bookkeeping

- ## 4. Insurance

- ## 5. Attorney

Notes

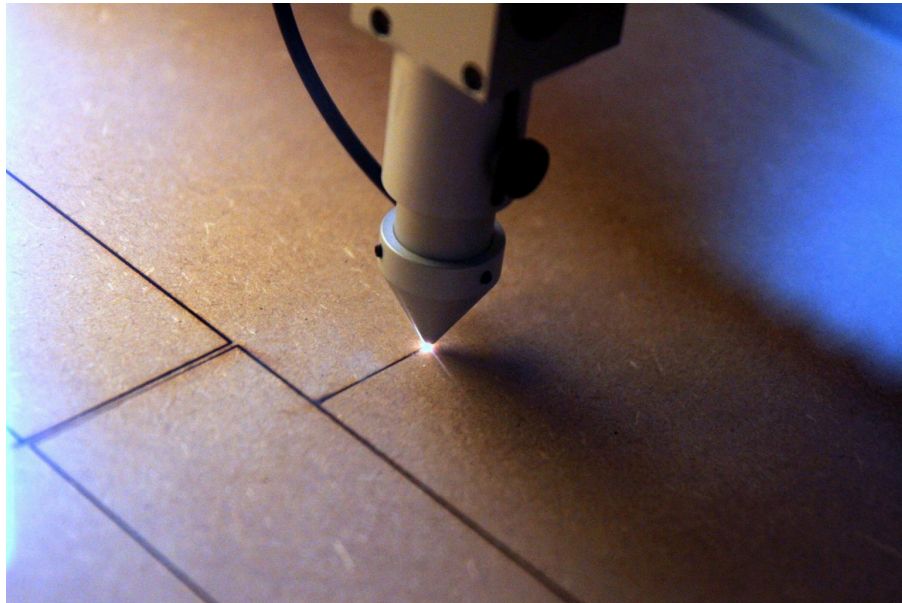
This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on its right side, suggesting it's resting on a surface.

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BUSINESS PLAN

BUSINESS DETAILS

These are the details that you must establish to have a good foundation for your new business. Follow the plan to make sure that you don't miss anything. CITY BUSINESS REQUIREMENTS – Your Local City Hall Office COUNTY BUSINESS REQUIREMENTS – County Clerk Office STATE BUSINESS REQUIREMENTS – STATE CAPITAL OFFICE LEGAL REQUIREMENTS – Operating Permits etc. For Your Industry



Notes

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BUSINESS PLAN

LEADERSHIP

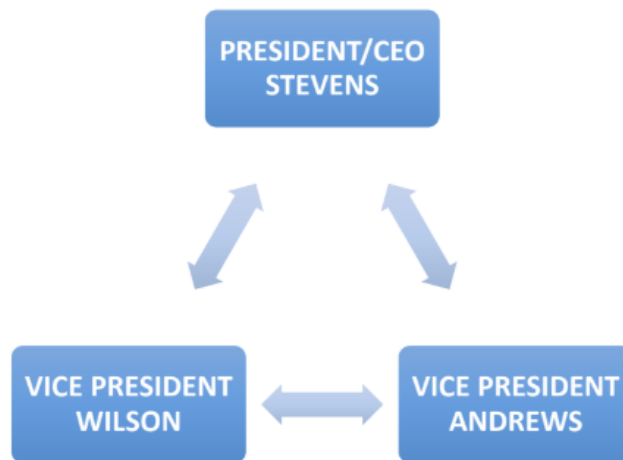
Leadership is like the rudder that guides the ship, your business. You must have strong leadership in order for your business to stay on track to success. To begin with you may appoint several people to positions in your leadership level, or you may be the only one in leadership.

You may be the President/CEO, the Vice President, and the Board of Directors. As time goes on you can appoint people to positions that you think will be a good fit and who will help drive your business forward and to success.

For now create a chart that best describes your leadership positions, and then you can fill in the blanks with names of those who will fill the positions. If you don't know yet, you can just put your name in the blanks.

Now create a description for the positions. For example, CEO: Description, Responsibilities, and Duties. President: Description, Responsibilities, and Duties. Vice President: Description, Responsibilities and Duties. Board of Directors: Description, Responsibilities and Duties. Etc.

1. Leadership organization chart
2. Positions
3. Descriptions, Responsibilities and Duties



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BUSINESS PLAN

MANAGEMENT

HONESTY, INTEGRITY, GOOD WORK ETHIC

**“Management Is A Position Of Responsibility, Not A Job.
You Are To Be Where You Are Needed, When You Are
Needed, To Run A Smooth And Profitable Operation”**

**“It is your product that brings the customer to you
It is your service that brings them back.”**

You must be 100% committed to your business. There is no successful “Part-Time” management. You must dedicate yourself to “Eat, Breath, and Sleep” your business! There is no exception!

You must be available 24 hours a day, 7 days a week, and 52 weeks out of the year. Even on your time off, you must make yourself available to the business in case of emergency.

If you are the only manager, make sure you have someone who is responsible who can fill in for you when you must be gone from the operation.

Display your product, promote your product, and support your product the best that you can. This will encourage your customers to come to you. When they come, remember you must treat each and every customer as if they were your most important customer. Be happy to see them, and make friends with them. They will return and they will tell their friends.



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MANAGEMENT
RESPONSIBILITIES

1. As the Manager/Owner you are responsible for the entire operation.
 - a. All actions, positive or negative, by all employees
 - b. All day-to-day activities.
 - c. Any profits or losses in the operation.
 - d. Any increase or decrease in volume.
 - e. All customer relations.
 - f. You are to be where you are needed, when you are needed to run a smooth and profitable operation.
2. You must maintain a good positive attitude at all times.
 - a. Walk, Talk, Act and Look like a Manager/Owner. Be Professional.
 - b. Set a good example for employees. Maintain and practice good business ethics at all times.
3. You must be dedicated and dependable.
 - a. You must be a self-starter, and be self-motivated.
 - b. You must be aware of the entire operation at all times.
 - c. Continue to learn and study your job. Learn as much as you can about the business, and about being a better manager.
 - d. You must be available at all times to report to duty or assign someone to work for you in case of emergency.
 - e. Remember, you are your business. Represent your company in a professional manner, whenever and wherever you are.

Notes

THE WINNING FOCUS
BUSINESS PLAN
MANAGEMENT
DUTIES

1. You must be involved in, and you must control all day-to-day activities.
 - a. All customers must be taken care of in a friendly and timely manner.
 - b. All phone calls must be answered in a timely manner.
 - c. Check and double check the schedule every day.
 - d. Make sure all employees are informed of the schedule and communication is always open with staff, management, and leadership.
 - e. Make sure you check POS sales, discounts and labor hourly.
 - f. Record and file all invoices daily.
 - g. Check all employees' times in/out daily.
2. Operation Daily Check
 - a. All equipment
 - b. Inventory
 - c. Check with all employees for proper uniforms.
 - d. All work stations.
 - e. Store rooms and coolers.
 - f. Loading dock.
 - g. Entrance
 - h. Front of house.

Notes

THE WINNING FOCUS

BUSINESS PLAN

MANAGEMENT

1. Number of management positions

2. Responsibilities of manager(s)

3. Management Handbook

4. Management Training

5. Management Evaluations



THE WINNING FOCUS

BUSINESS PLAN

MANAGEMENT WEEKLY REPORT

The purpose of the Weekly Management Report is to stay in line with your goals. Pay special attention to detail in this report. Choose one day of the week and a time of day that you will sit down and fill out this report every week. If you get overwhelmed and you miss a few days, get back on track as soon as you can.

Don't get in a rut of filling out the same information each week. Think outside of the box and find ways to continually improve your business. Find new ways to market and promote your business. Continue reading and studying and talk to other business people.

Set your projections higher and higher. Make yourself uncomfortable and always try to do better. When you don't hit your projections, figure out why you didn't and come with ways to make your projections.

Make copies of this weekly report and make sure you use them each week. This will keep you on track with your goals and moving toward your ultimate goal.

Notes



THE WINNING FOCUS
BUSINESS PLAN
MANAGEMENT WEEKLY REPORT
PART I

Name _____ Date _____

Projections for the week of _____

Objectives

Areas to work on

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

THE WINNING FOCUS
BUSINESS PLAN
MANAGEMENT WEEKLY REPORT
PART I

Names, addresses, phone numbers of people to contact

Special events, functions to attend

Sales Projected \$ _____

Notes

Signed _____ Date _____

THE WINNING FOCUS
BUSINESS PLAN
MANAGEMENT WEEKLY REPORT
PART II

Name _____ Date _____

Summary of week _____

Objectives accomplished

Areas worked

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Sunday

THE WINNING FOCUS
BUSINESS PLAN
MANAGEMENT WEEKLY REPORT
PART II

Names, addresses, phone numbers of people contacted

Special events, functions attended

Sales for week \$ _____

Notes

Signed _____ Date _____

THE WINNING FOCUS
BUSINESS PLAN
HOW TO HANDLE CUSTOMERS

Under-Promise & Over-Deliver

Seamless Service

Supply the customer's needs and wants

1. _____

2. _____

3. _____

Make sure the customer feels good

1. _____

2. _____

3. _____

Follow through with the customer

1. _____

2. _____

3. _____

THE WINNING FOCUS

BUSINESS PLAN

HOW TO HANDLE CUSTOMERS

HANDLING CUSTOMER COMPLAINTS

Handling customer complaints can be challenging. But the most important thing to remember is that losing just one customer can eventually lead to the demise of your business. You never know who someone is, and the influence that they may have on so many other customers or potential customers.

We all know that there are customers who will always complain about something. And there are customers who will always want something for nothing. It is up to you to figure out if the complaint is legitimate. If you really believe that someone is taking advantage of you or your business, then it is up to you to dismiss them and get back to taking care of the rest of your happy clients.

When you have a customer who is not completely satisfied:

#1 Apologize.

#2 Listen and make sure that you understand their complaint.

#3 Assure the customer that you will make every effort to make them completely satisfied.

1. _____

2. _____

3. _____

4. _____

Notes

THE WINNING FOCUS

BUSINESS PLAN

HUMAN RESOURCES

Human resources is the core of your operation. Proper Hiring, Training, and supervising your staff, will lead your company to success. Beginning with the interview, make sure you are presenting your company to the potential employee, in a way that the potential employee will understand the importance of being professional and following your lead in Honesty, Integrity, and a Good Work Ethic.

1. Number of employees you will need

2. Job Descriptions of each position

3. Hiring Process

4. Training Process

5. Employee Handbook

6. Company Policies

7. Benefit Package

8. Uniforms

THE WINNING FOCUS

BUSINESS PLAN

HUMAN RESOURCES

HOW TO HANDLE EMPLOYEES

Handling employees can and possibly will be your biggest challenge in running your business. From hiring, training, and scheduling, to motivating and terminating, at times you will be pushed to your limits.

The most important part in having a good staff, is hiring the right people. When interviewing, make sure you understand why the person wants the job, and hire people who really want to work for your company.

When hiring a staff member, give them a complete understanding of what is expected of them. Give them a copy of company policies and make sure they understand them. Give the new employee a job description for the position they will fill. And give them a copy of the Employee manual, which will explain to the new employee the benefits, promotions and raises policies, and disciplinary actions.

Have a good thorough training in place for every position in your business. Insist that each person follow-through with the complete training and has a full knowledge of the position they will be filling.

Continue to motivate your staff. Create a good work environment and a good culture for your company. Stop conflicts quickly and issue disciplinary actions if the tension continues.

Use disciplinary action as a last result. Do not issue a reprimand and/or write-up without good cause, and only issue a written warning after you have given the employee at least one verbal warning.

Notes

THE WINNING FOCUS
BUSINESS PLAN
HUMAN RESOURCES
HOW TO HANDLE EMPLOYEES

Create a good culture and a good work environment

1. _____

2. _____

3. _____

4. _____

Motivate your employees

1. _____

2. _____

3. _____

4. _____

Notes

THE WINNING FOCUS
BUSINESS PLAN
HUMAN RESOURCES
HOW TO HANDLE EMPLOYEES

How to handle good employees

1. _____

2. _____

3. _____

4. _____

How to handle poor performing employees

1. _____

2. _____

3. _____

4. _____

Notes

THE WINNING FOCUS
BUSINESS PLAN
HUMAN RESOURCES
POLICIES

1. Come To Work With A Good Attitude.
2. Be On Time.
3. When Calling In Sick You Must Call In At Least 4 Hours Before Your Shift, And You Must Talk To A Manager On Duty.
4. Wear Proper Uniform; Shirt, Pants, Shoes. Hair Must Be Neat.
5. Come To Work With Good Personal Hygiene.
6. No Firearms, Weapons, Alcohol, Or Drugs At Work.
7. Do Not Steal.
8. Show Respect For Management, Co-Workers And Yourself.
9. No Cell Phone Use While Clocked In.
10. You Must Clock Out For Meal Break.
11. All Food Must Have A Ticket, And Must Be Eaten While You Are Clocked Out. Complete All Work Before Clocking Out.
12. No Sitting With Guests While In Uniform, and / Or While You Are Clocked In. 13. Only One Person From Back Of House, And / Or One Person From Front Of House, On Smoking Break At A Time.
14. Maintain Professional Conduct At All Times.

Notes

Employee

Supervisor

SCHEDULE

[illegible]

THE WINNING FOCUS

BUSINESS PLAN

HUMAN RESOURCES

EVALUATION

Name _____ Date _____

Position _____

	Excellent	Good	Average	Poor
Attitude	_____	_____	_____	_____
Honesty	_____	_____	_____	_____
Motivated	_____	_____	_____	_____
On Time	_____	_____	_____	_____
Good Personal Hygiene	_____	_____	_____	_____
Proper Uniform	_____	_____	_____	_____
Respect For Management	_____	_____	_____	_____
Respect For Coworkers	_____	_____	_____	_____
Good Customer Service	_____	_____	_____	_____
Teamwork	_____	_____	_____	_____
Overall Evaluation	_____	_____	_____	_____

Notes

Employee

Supervisor

THE WINNING FOCUS
BUSINESS PLAN
HUMAN RESOURCES
EMPLOYEE WARNING

Name _____ Date _____

Position _____

Violation

___ Alcohol/Drug

___ Attendance

___ Carelessness

___ Conduct

___ Insubordination

___ Personal Work

___ Safety

___ Refusal To Work

___ Damage To Property

___ Tardiness

___ Unauthorized Absence

___ Work Quality

___ Other

___ 1st Warning ___ 2nd Warning ___ 3rd Warning ___ Final Warning

Action Taken

Employee Statement

Employee

Supervisor

THE WINNING FOCUS

BUSINESS PLAN

FINANCIAL INFORMATION

Lender(s) need for capitalization and ability to repay it.

1. Financial statements

2. Personal financial sheets for all principles of the business.

3. Capitalization plan – Funds needed over next 1 year/5yars

4. Statement specifying how loan funds will be utilized.

5. Bookkeeping and Accounting Basics



THE WINNING FOCUS

BUSINESS PLAN

HOW TO INVENTORY

Inventory is a very important part of your business and a very important part of controlling your expenses. It is vital to the operation that you know at all times exactly how much inventory you have. You want to make sure that you don't run out of product and that you don't have too much on hand. Most successful operations inventory all products weekly or at the least once a month.

On the following Inventory Sheet you can see a column for the item the amount of the item on hand, the date, how many/much of the item to order, and the price. An easy way to keep track of your inventory is to create an inventory sheet in an Excel format and then it will do the math for you in ordering and also finding out how much money you have in inventory.

Always keep just enough product that you will not run out, but don't over order. Ordering too much product, will create a temptation for stealing and also for employees to waste product when they know there is plenty.

Make sure you rotate product and keep the oldest going out and the newest in the back.

First In, First Out. FIFO



HOW TO INVENTORY

[illegible]

Notes

[illegible]

THE WINNING FOCUS

BUSINESS PLAN

HOW TO ORDER

When you are getting ready to order more product(s) you can use the same sheet that you used for inventory. You must know how much product you have on hand in order to make sure you order the right amount of product. When you over order product, then you are putting funds into product that you cannot cash out, and use for another expense.

You want to make sure you have enough products on hand in the event of special occasions when you may do more business than you normally do, holidays, special events, etc. Also hopefully you are increasing sales and you want to make sure you have enough to cover the increase in business.

When your order arrives, put it away quickly to keep your operation looking neat and orderly. Product sitting out will invite pilferage and waste and may spoil or get damaged.

Notes



THE WINNING FOCUS

BUSINESS PLAN

HOW TO CONTROL COSTS

Controlling costs requires skill. You must be all places in your operation at the same time. Everything we have covered from hiring employees to inventory and ordering will play a role in controlling your costs. If you do everything well that we have talked about so far your costs will be in line. This will take practice and you will get better as time goes on, but you must focus.

From turning off the lights when not in use, to sending employees home when the business slows down, you must watch all the expenses all the time.

When I am running an operation, I am constantly moving throughout the operation. I want to see what each employee is doing. I want to make sure there is enough product to sell and make the customers happy. I want to make sure orders are going out on time and that the phone is being answered promptly.

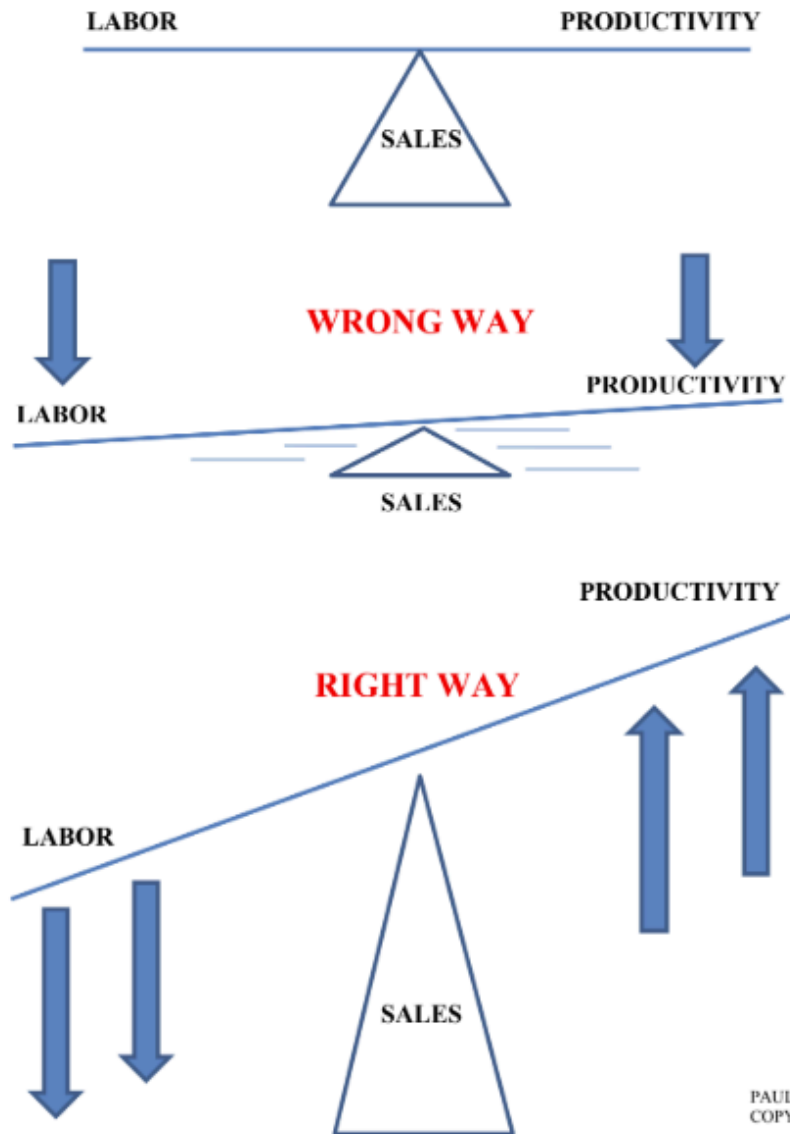
If I continually move through the operation, the staff stays on their toes. They know that I am watching and I know what is going on. I check in the store rooms, and I look under counters. I check bags and backpacks. I want to know what is going on in my operation at all times.

But the best way to control costs is to increase sales and increase productivity. The more sales you have the easier it is to control costs. If you have 5 employees on duty, and you are making \$1,000.00, if you increase the productivity, the sales will increase and the percentage of costs automatically decreases.

On the following page you can see that if we try to force the labor down by cutting the schedule and making the employees double up and work harder, we make the staff upset, and decrease the productivity and smash the sales. But if we motivate the staff and increase their productivity, we are increasing the sales automatically, and we are also automatically decreasing the labor costs.

Notes

THE WINNING FOCUS
BUSINESS PLAN
HOW TO INCREASE PRODUCTIVITY



THE WINNING FOCUS

BUSINESS PLAN

HOW TO INCREASE SALES

Without sales, you will not have a business. The first and most important aspect of the business is people walking in the front door, and/or people ordering your product or service online. We set up the business, and we opened the doors. We hired and trained the staff, and we promoted the business. Now it's time to make sure we stay in business.

While we are doing all the daily tasks from taking inventory to making out the schedule, we must always be aware of the customer getting taken care of properly and leaving happy. This must be our true focus at all times.

So when we go back and look at each part of the business, it is up to us to make sure it all comes together. The staff does their part in coming to work. They vendors do their part in getting the product to us. The power company does their part in making sure the lights are on. It is up to us too bring it all together.

We are like the conductor in the musical. We are like the director making the movie. We are like the coach leading the winning team. Our staff is looking up to us to guide them to victory. The customers count on us to make them happy and provide the products and service that we promised them in our advertisements. And we are counting on ourselves to do the best job we can and make the business successful.

When each aspect of the business is managed as it should be and when the staff has a manager they can count and when the customers come in and they are "WOWED", the business will thrive. Sales will go up and expenses will stay in line.

How do we increase sales? Stay Focused!

Notes

THE WINNING FOCUS

BUSINESS PLAN

REPORTS

The daily sales report is basic. Beginning from the first day of the month. Put in the Sales less tax. Put in the tax in the next column. Total net sales and tax for the gross sales. Each day add the sales for that day, to the To Date (T/D) sales. Then divide that number by the days of the month so far for the Ave Daily Sales. Put in the next column the customer count. Add today's customer count to the previous days TD customer count. Divide that number by the number of days in the month so far.

With this form we can keep track of the sales by day, and the total sales each day throughout the month so we have a daily average of sales. Also we can keep track of the customer count so we can make sure our customer count is increasing each month.

DAILY SALES REPORT									
DATE	NET SALES	TAX	GROSS SALES	T/D SALES	AVE DAILY SALES	CUST COUNT	TD CUST COUNT	AVER CUST COUNT	COMMENTS
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									
26									
27									
28									
29									
30									
31									
TOTAL									

THE WINNING FOCUS

BUSINESS PLAN

REPORTS

The deposit report is how we keep track of the money coming into our operation. We want to make sure we have accurate records so we know exactly how much money we have to run the operation.

In the report begin by putting the gross sales for the day. Next put in the cash deposit and the credit cards deposit, then add the two together for the total deposit. Then subtract the deposit from the daily sales, to determine if you are over or short. Next add the daily sales to the Month To Date, (MTD) sales. Then add the total deposit to the Month To Date (MTD) deposit. Then subtract the MTD deposit from the MTD sales to determine the MTD over or short.

DEPOSIT REPORT								
DATE	GROSS SALES	CASH DEPOSIT	CREDIT CARDS	TOTAL DEPOSIT	OVER/SHORT	MTD SALES	MTD DEPOSIT	MTD OVER/SHORT
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30								
31								
TOTAL								

THE WINNING FOCUS

BUSINESS PLAN REPORTS

It is imperative that you keep track of the money you spend, whether you are paying cash or by credit card. Each day fill out a new Invoice Log. Put in the date, the invoice number, the company and the dept. # that you choose to use for your categories. Then put in the amount of the invoice, log if you paid in cash or if it is charged. Then put in the total, and total the invoices from the day before.

[illegible]

THE WINNING FOCUS

BUSINESS PLAN REPORTS

The labor report will help you keep track of the money you are spending on your labor. This is very important because labor is one of the most costly expenses in your business.

In column 2 put in your sales for the day. In column 3 put in the labor total for the front of the house. In column 4 put in the total labor for the back of the house. Then in column 5 put in the total management labor. In Column 6 put in the total hours for all employees. In column 7 put in the dollars for all employees. Divide the total dollars by the total sales and this gives you the labor % for column 8. Then divide the sales by the total hours and this is the productivity for column 9.

[illegible]

THE WINNING FOCUS

BUSINESS PLAN

PROFIT & LOSS STATEMENT

On the Profit & Loss Statement, we put our sales for the week or month, and the expenses. For a new business it is advisable to create your Profit & Loss Statement each week. This way you can make sure on a weekly basis that your expenses are in line, and that you are on track to make a profit.

Begin by putting your gross sales at the top, and then put in the sales tax, cost of goods, and then subtract those from the sales. This gives you the gross profit.

Then put in the selling expenses, salaries & wages, payroll taxes and the other expenses listed and total them.

Next put in the general administration expenses and total these.

Add up all your expenses, and put that total in the total operating expenses. Now subtract the total operating expenses from the gross profit. This is your Profit or Loss.

Notes



THE WINNING FOCUS

BUSINESS PLAN

PROFIT & LOSS STATEMENT

Revenue

Gross Sales	\$ _____
Sales Tax	\$ _____
Cost of Goods – Our Product (Food, Clothes, Inventory etc.)	\$ _____
Gross Profit	\$ _____

Operating Expenses

Selling

Salaries & Wages (employees)	\$ _____
Payroll Taxes	\$ _____
Commissions	\$ _____
Advertising	\$ _____
Other Expenses	\$ _____
Total Selling Expenses	\$ _____

General Administration

Salaries & Wages (management)	\$ _____
Payroll Taxes	\$ _____
Employee Benefits	\$ _____
Insurance	\$ _____
Depreciation	\$ _____
Automobile Expenses	\$ _____
Dues & Subscriptions	\$ _____
Legal & Accounting	\$ _____
Office Supplies	\$ _____
Telephone	\$ _____
Utilities	\$ _____
Rent	\$ _____
Taxes & Licenses	\$ _____
Other Expenses	\$ _____

Total General & Administrative	\$ _____
--------------------------------	----------

Total Operating Expenses	\$ _____
---------------------------------	-----------------

Operating Profit or Loss	\$ _____
---------------------------------	-----------------

THE WINNING FOCUS

BUSINESS PLAN

1st YEAR PROJECTIONS

Projections are basically an educated guess. We take the information we have gathered from our market research and we create our projections.

The information comes from the history, and the projections of the industry our business is in. We also take the information about all the businesses that we have researched, as well as our local competition.

We estimate the revenue, volume / sales, based on the comparison of our business, to the market average. This average may be based on the square feet of our location, it may be based on the number of employees, it may be based on the size of the surrounding population, it may be based on the demographics. There are many ways we can estimate our projections.

Also we must tell how we come up with the projections that we have, and how accurate we think they are?

Indicate below what information you based your projections on. Where did you get the information? Can your information be verified? Will the facts change over the next year, 5 years etc.?

Based on research and the estimated Revenue, Volume/Sales of the business, create the projections. Begin with daily, then weekly, monthly, quarterly, yearly, and up to 5 or even 10 years and beyond.

What is the Average Volume of each business in the industry that your business is in? For

example if the total Industry volume is \$8,000,000,000 a year, and there are 45,000

businesses in that industry, divide \$8 Billion by 45 thousand locations or businesses, which equals \$177,777 average volume per location per year.

\$ _____

What is the average Volume of each location or business per quarter? Divide the average annual volume of \$177,777 by 4 quarters which equals \$44,444 per quarter. \$ _____

What is the Average Volume of each location or business per month? Divide the \$44,444 by 3 months which equals \$14,814 per month.

\$ _____

THE WINNING FOCUS

BUSINESS PLAN

1st YEAR PROJECTIONS

MONTHLY PROJECTIONS														
START-UP COSTS	START-UP COSTS	1ST MONTH	2ND MONTH	3RD MONTH	4TH MONTH	5TH MONTH	6TH MONTH	7TH MONTH	8TH MONTH	9TH MONTH	10TH MONTH	11TH MONTH	12TH MONTH	TOTAL
SALES														
COST OF GOODS SOLD														
LABOR														
OPERATING SUPPLIES														
RENT														
UTILITIES														
INSURANCE														
PERMITS														
PHONE														
CABLE														
OFFICE														
ADVERTISING														
EQUIPMENT														
TOTAL INVESTMENT														
RESERVE														
TOTAL EXPENSES														
PROFIT / LOSS														

THE WINNING FOCUS
BUSINESS PLAN
QUARTERLY PROJECTIONS

QUARTERLY PROJECTIONS						
START-UP COSTS	START-UP COSTS	1ST QUARTER	2ND QUARTER	3RD QUARTER	4TH QUARTER	TOTAL
SALES						
COST OF GOODS SOLD						
LABOR						
OPERATING SUPPLIES						
RENT						
UTILITIES						
INSURANCE						
PERMITS						
PHONE						
CABLE						
OFFICE						
ADVERTISING						
EQUIPMENT						
TOTAL INVESTMENT						
RESERVE						
TOTAL EXPENSES						
PROFIT / LOSS						

THE WINNING FOCUS
BUSINESS PLAN
5 YEAR PROJECTIONS

5 YEAR PROJECTIONS						
START-UP COSTS	START-UP COSTS	1ST YEAR	2ND YEAR	3RD YEAR	4TH YEAR	5TH YEAR
SALES						
COST OF GOODS SOLD						
LABOR						
OPERATING SUPPLIES						
RENT						
UTILITIES						
INSURANCE						
PERMITS						
PHONE						
CABLE						
OFFICE						
ADVERTISING						
EQUIPMENT						
TOTAL INVESTMENT						
RESERVE						
TOTAL EXPENSES						
PROFIT / LOSS						

THE WINNING FOCUS
BUSINESS PLAN
SUPPORTING DOCUMENTS

Any documents that will strengthen the plan.

1. Survey results

2. Letters of reference

3. Contracts – personal and business

4. Leases – copies and/or list

5. Letters of intent

6. Sales agreements

7. Resumes

8. Personnel policies

THE WINNING FOCUS

BUSINESS PLAN

SUPPORTING DOCUMENTS

9. Job descriptions for management and staff

10. Credit reports, personal and business

Notes



THE WINNING FOCUS

BUSINESS PLAN

CONCLUSION

Remember, Honesty, Integrity and a Good Work Ethic should be your foundation.

Always give 110% to your business. Make sure you are focused and keep on task. Be good to your staff, and keep them motivated. Remember if you treat them with respect they will do the same to your customers.

Keep motivated and keep doing the weekly management report. Fine tune the operation. Look around each day and find areas where you can improve. Keep raising the bar and increase your standards. Don't settle for less from yourself or your staff. When someone is slipping, meet with them immediately and find out how you can help them come back 110%.

You are to be where you are needed, when you are needed to run a smooth and profitable operation.

Have fun and remember why you went into business in the first place. Make a game out of it, and enjoy the success.

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***START YOUR BUSINESS,
LIKE A BOSS!***

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