# A.I.M

## THE FUNDAMENTAL FRAMEWORK FOR ASPIRING, SOLO, AND FIRST-TIME ENTREPRENEURS.



HAROLD DANGERVIL

# TABLE OF CONTENTS


Welcome! 3

How to Use This E-book 4

Part 1: Assessment 5

Part 2: Identity 15

- Mission Statement 17
- Vision Statement 27
- Business Description 41
  - Operations 43
  - Marketing 64
  - Finance 108

Part 3: Measures 126

Conclusion 141

Credits & Acknowledgements 143

# WELCOME!

I'm Harold Dangervil and I have been helping people start, build, and grow their own business for over 18 years. Its one of my favorite things to do because I believe that God has given everyone of us a gift and a purpose and the best vehicles to house our gifts and purpose is by having a business that serves people.

However, starting and growing a business isn't easy because you may not understand things like operations, marketing, and finance all at once. Many business owners work hard but struggle to explain how their business creates value, who it serves best, or how daily activities translate into profits and long-term sustainability. That's why I created the A.I.M Framework

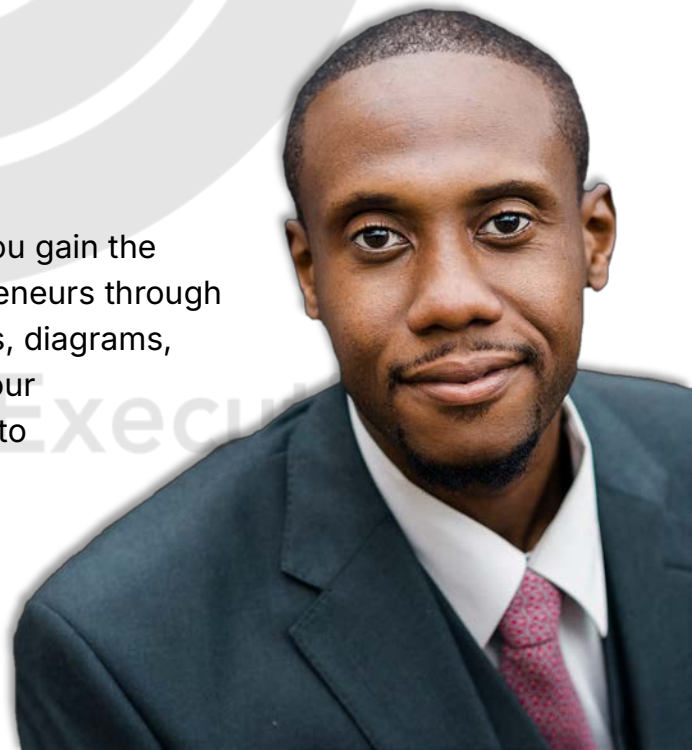
The A.I.M Framework offers  simple, structured way to understand how a business works
A.I.M stands for:

- **Assessment**
- **Identity**
- **Measures**

It provides a practical business tools for:

- **Assessing your business capabilities**
- **Identifying your core mission**
- **Designing operations**
- **Building effective marketing**
- **Managing finances with clarity**
- **Creating accountability**

As you go through this eWorkbook, it is my hope that you gain the insight and wisdom that I have given dozens of entrepreneurs through on one coaching sessions. I will provide you with charts, diagrams, and worksheets so that you can design every part of your business confidently and with precision. I look forward to hearing how you succeed in fulfilling your purpose and using your gift as a force for God.



$tay Blessed!

# HOW TO USE THIS EBOOK

This eBook (hereafter referred to as eWorkbook) is created to support solo entrepreneurs, early-stage small businesses, service-based businesses, and anyone aspiring to start a business. It is designed to be both informational and practical. you are encouraged to actively engage with the concepts, questions, and exercises provided throughout.

To get the most out of this eWorkbook, it is recommended that you do the following:

1. READ WITH INTENTION

   Each section introduces a core business concept and explains why it matters. Take time to understand the idea before moving on to the exercises.

2. COMPLETE THE EXERCISES AS YOU GO

   Throughout the eWorkbook, you will find questions, worksheets, and business tools. They are designed to help you apply the concepts directly to your own business or idea, even if you are just starting out. Write your answers down!

3. FOCUS ON PROGRESS, NOT PERFECTION

   Start with your best understanding today. Many of the tools in this eWorkbook are meant to be revisited and refined over time. You can update your responses as your business grows.

4. USE THE FRAMEWORKS IN ORDER

   Each section builds on the previous one. For best results, follow the eWorkbook in sequence. The business tools are layered to help you move from **Strategy** to **Execution**.

5. TREAT THIS AS A WORKING DOCUMENT FOR YOUR BUSINESS PLAN

   This eWorkbook is meant to help you build your business from start to finish. The business tools, when used together, will give you the components of a business plan.

6. APPLY WHAT YOU LEARN IMMEDIATELY

   After completing each section, identify one small action you can take right away. Execution, even at a small scale, is what turns insight into results.

7. USE THIS AS A GUIDE, NOT A RULEBOOK.

   Use this eWorkbook as a foundation to make informed decisions, build confidence, and create a business that aligns with your vision.

# PART - 1: ASSESSMENT

***But don't begin until you count the cost. For who would begin construction of a building without first calculating the cost to see if there is enough money to finish it?***

**- LUKE 14:28**

# ASSESSMENT

Our first step in our framework is Assessment. To do this we will use a **SWOT analysis**. This tool helps you reflect deeply on your business and then converts your insights into strategic actions.

### What is a SWOT Analysis?

A SWOT analysis is a strategic planning tool used to help individuals or organizations assess both internal and external factors that can impact their success. SWOT stands for Strengths, Weaknesses, Opportunities, and Threats.

- Strengths- What you do well; your unique assets or capabilities.
- Weaknesses - Areas where you lack resources, skills, or efficiency.
- Opportunities - External trends or changes you can take advantage of.
- Threats - Potential challenges or risks from the outside environment.

### Why is a SWOT Analysis Important?

A SWOT analysis gives you a clear, organized snapshot of where your business currently stands. It has helped businesses make smarter decisions based on honest self-awareness, discover areas for growth and avoid being blindsided by risks or competitors. The goal of a SWOT analysis is to create strategies that play to your strengths while managing your vulnerabilities.

### Who can benefit from s SWOT Analysis?

Two groups ultimately benefit from conducting regular SWOT analysis. Aspiring entrepreneurs looking to start a business and entrepreneurs in existing business who need to form a strategy. The following are the benefits to each respectively:

| START - UPS | EXISTING BUSINESSES |
|---|---|
| Clarifies what you bring to the table as a new player. | Acts like a business health check where you ask what's still working and what's not. |
| Helps identify the most urgent needs | Supports pivoting or expanding by revealing hidden opportunities. |
| Uncovers market gaps or trends you can tap into early. | Helps prioritize goals and allocate resources more effectively. |
| Prevents common pitfalls by highlighting threats or weaknesses before they become critical. | Keeps you proactive in a changing market rather than reactive. |

Whether you're building from the ground up or evolving your business, a SWOT analysis helps you think strategically, not just reactively. It is a simple yet powerful business tool that fortune 500 companies use to take control of their direction so small businesses and sole entrepreneurs can use it to do the same.

In the following pages, you will be introduced to **SWOT Analysis Questions, A SWOT Analysis Worksheet, and a SWOT Analysis Strategy Builder**. The following is an explanation of each tool and how to use them:

## SWOT ANALYSIS QUESTIONS

Guided prompts designed to help you think critically about your business from both internal and external perspectives. They help you identify Strengths, Weaknesses, Opportunities, and Threats.

### How to Use It

Read through each question slowly. Answer each question focusing on facts, patterns, and trends. Keep your answers short and specific.

## SWOT ANALYSIS WORKSHEET

A structured, visual tool that organizes your answers into the four SWOT categories. It turns scattered thoughts into a clear snapshot of your business's current position.

### How to Use It

Transfer your best answers from the SWOT Analysis questions into the appropriate section. Be sure to limit you answer to 5 strong points and afterward, look for any themes, overlaps, and red flags

## SWOT ANALYSIS STRATEGY BUILDER

A worksheet that is used to turn insight into action. It helps you design strategies by intentionally connecting the SWOT elements.

### How to Use It

Analyze your SWOT Analysis worksheet and use the guided prompts to see where you can leverage your strengths, improve on weakness, take advantage of opportunities, and guard against threats.

On the following page, you will work through an example that demonstrates how to use the SWOT Analysis Questions, Worksheet, and Strategy Builder. This example is based on a hypothetical startup web development agency, **ABC Web Company, Inc.,** and is designed to help you understand how to apply these tools to your own business.

# SWOT ANALYSIS QUESTIONS

Use the questions below to think about the current state of your business or idea. Write down your answers on the **SWOT Analysis Worksheet** provided to you on the next page. Once complete please move on to the **SWOT Analysis Strategy Builder Worksheet**.

## S
### STRENGTHS

- What do you do exceptionally well?
- What skills, certifications, or knowledge do you have?
- What internal resources do you possess?
- What do people like most about you or your service/product?
- What values or purpose makes your business unique?

## W
### WEAKNESSES

- Where do you consistently fall short - delivery or performance?
- What are your limitations in systems, processes, or staffing?
- What skills, tools, or information do you currently lack?
- What causes customer complaints or dissatisfaction?
- What part of your business feels most fragile or uncertain?

## O
### OPPORTUNITY

- What trends are creating new needs or desires in your market?
- Are there new platforms or technologies you could adopt early?
- What gaps in the market could your business fill?
- Are there any customers looking for alternatives?
- What is missing in your market?
- Are there possible funding sources or partnerships?

## T
### THREAT

- What are your most aggressive competitors doing?
- Are there rising costs or supply chain challenges?
- Are customer habits, laws, or regulations shifting?
- Could economic downturns impact customers or pricing power?
- Are you overly dependent on one vendor, customer, or channel?

Example:

# SWOT ANALYSIS WORKSHEET

| | POSITIVE PERSPECTIVE | NEGATIVE PERSPECTIVE |
|---|---|---|
| INTERNAL FOCUS | **STRENGTHS**<br>- Strong design skills<br>- Fast turnaround time<br>- State of the art technology<br>- In-depth industry knowledge<br>- 18 years of Web development experience | **WEAKNESSES**<br>- Speaking with customers<br>- Low Capital<br>- Little business experience<br>- No team<br>- Limited Brand recognition |
| EXTERNAL FOCUS | **OPPORTUNITIES**<br>- Growing demand for professional websites<br>- High Demand for website optimization<br>- Rising need for mobile friendly performance<br>- Offer support service<br>- Strategic partnerships with consultants and coaches | **THREATS**<br>- Highly competitive market<br>- DIY website builders<br>- Price sensitivity<br>- Rapid changes in technology |

**Example:**

# SWOT ANALYSIS STRATEGY BUILDER WORKSHEET

## LEVERAGE STRENGTHS

**Which strengths can you double down on to stand out more in your market?**

**How can your strengths be used to take advantage of new opportunities?**

**Can any strengths be turned into a unique signature or guarantee?**

**ACTION STEPS:**

We will promote our experience,. strong design skills, and fast turnaround are the reason we are trustworthy

## IMPROVE WEAKNESSES

**Which weaknesses can be improved immediately with a system, tool, or hire?**

**Are there ways to partner or outsource to cover your gaps?**

**Which weaknesses are low-priority distractions—and can be ignored for now?**

**ACTION STEPS:**

- Hire salespeople
- Look into SBA Loans
- Leverage Social Media to Build Trust

## SEIZE OPPORTUNITIES

**Which opportunities are most time-sensitive?**

**What are 1–2 quick wins you can pursue in the next 30 days?**

**What resources or partners would help you pursue your best opportunity?**

**ACTION STEPS:**

Exchange Web services for client referrals from Consultants and coaches

## PROTECT AGAINST THREATS

**What contingency plans can you develop to handle external risks?**

**Can you diversify vendors, clients, or platforms to reduce vulnerability?**

**How can you monitor changes in your market and respond faster?**

**ACTION STEPS:**

Highlight issues with DIY sites

- Subscribe to Industry Newsletters
- Create Trust through education



# YOUR TURN

Use the worksheets on the following page to create your own **SWOT Analysis**.

# SWOT ANALYSIS QUESTIONS

Use the questions below to think about the current state of your business or idea. Write down your answers on the **SWOT Analysis Worksheet** provided to you on the next page. Once complete please move on to the **SWOT Analysis Strategy Builder Worksheet**.

## S
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- What do you do exceptionally well?
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- Are customer habits, laws, or regulations shifting?
- Could economic downturns impact customers or pricing power?
- Are you overly dependent on one vendor, customer, or channel?

# SWOT ANALYSIS WORKSHEET

| | POSITIVE PERSPECTIVE | NEGATIVE PERSPECTIVE |
|---|---|---|
| INTERNAL FOCUS | **STRENGTHS** S | **WEAKNESSES** W |
| EXTERNAL FOCUS | **OPPORTUNITIES** O | **THREATS** T |

# SWOT ANALYSIS STRATEGY BUILDER WORKSHEET

## LEVERAGE STRENGTHS

**Which strengths can you double down on to stand out more in your market?**

**How can your strengths be used to take advantage of new opportunities?**

**Can any strengths be turned into a unique signature or guarantee?**

**ACTION STEPS:**

## IMPROVE WEAKNESSES

**Which weaknesses can be improved immediately with a system, tool, or hire?**

**Are there ways to partner or outsource to cover your gaps?**

**Which weaknesses are low-priority distractions—and can be ignored for now?**

**ACTION STEPS:**

## SEIZE OPPORTUNITIES

**Which opportunities are most time-sensitive?**

**What are 1–2 quick wins you can pursue in the next 30 days?**

**What resources or partners would help you pursue your best opportunity?**

**ACTION STEPS:**

## PROTECT AGAINST THREATS

**What contingency plans can you develop to handle external risks?**

**Can you diversify vendors, clients, or platforms to reduce vulnerability?**

**How can you monitor changes in your market and respond faster?**

**ACTION STEPS:**

# PART - 2: IDENTITY

*"For I know the plans I have for you," says the Lord. "They are plans for good and not for disaster, to give you a future and a hope".*

*- Jeremiah 29:11*

# IDENTITY

Now that you've assessed your business capabilities, the next step in our A.I.M Framework is **Identity**. Your business' Identity describes:

- What your business is.
- Where your business is going.
- How is it going to get there.

A business' Identity is made-up of its Mission, Vision and Business Description. The following list briefly describes each component and the tools we will use to create them:

| IDENTITY COMPONENT | COMPONENT DESCRIPTION | BUSINESS TOOL |
|---|---|---|
| **Business Mission** | The core purpose of the business that lets us know what the company is about | – Mission Statement Formula |
| **Business Vision** | Tells us what the business will accomplish and its desired effect in this world | – Vision Statement Formula |
| **Business Description** | Describes how the business will manage the three pillars of its business model: | – The 3 of Your Business Model |
| | **Operations** | – Value Chain Model |
| | **Marketing** | – Ideal Customer Profile |
| | **Finance** | – Ideal Customer Value<br>– Profit Formula |

To help you create the Identity of your business, we will go through each one of these components step by step. We will provide a formulaic approach to each one by providing business tools you can use so that you build your own mission statement, vision statement and business description.

*Commit your actions to the Lord, and your plans will succeed.*

**- PROVERBS 16:3**

# WHAT IS A MISSION STATEMENT ?

According to Peter Drucker, who is considered to be the father of modern-day business management, a mission statement will answer the question:

- "What is our business?"
- "What is its value to the customer?"

A mission statement is a short declaration of why the organization exists, what it does, and how it creates value.

A mission statement is like a business's way of introducing yourself to others but also keeps you focused on the true intentions of your business. It can be used whether you are a one-person army or leading a group of people. It can even be used in your career and personal life.

Here are some examples:

**Business – (Google)**

*"To organize the world's information and make it universally accessible and useful."*

**Business – Nonprofit**

*"To inspire and educate young people to be leaders in their communities through mentorship and service."*

**Parent**

*"To provide a loving, safe, and faith centered home where our children feel valued, supported, and guided."*

**Student**

*"To grow in knowledge, discipline, and character by committing to consistent studying and applying my education to becoming a doctor."*

**Professional**

*"As a therapist my mission is to provide compassionate, evidence-based care that helps individuals heal, build resilience, and develop healthier relationships."*

We will begin creating your business identity by developing a mission statement of your own. There are many ways to do this, however, we will use the Mission Statement Formula because It focuses on empowering you and reminding you of your commitment.

The following is the formula and a description of its components:




The formula above describes how we create a mission statement. It simply states that your mission statement is comprised of your purpose plus your actions and that is multiplied by your resolve. Let's take a closer look.

| | |
|---|---|
| **PURPOSE** | Answers the question "what do you want to achieve and for whom do you exist". It is typically expressed by the sentence structure "To [increase] ____for /of |
| **ACTION** | Answers the question "what activities will you perform to achieve your purpose". This is typically expressed with words like "by" or "with". |
| **RESOLVE** | Answers the question "why are you committed to performing the **Actions** that will achieve your **Purpose**". Resolve can be expressed with the word |

An example of this formula using the sample company, **ABC Web Company, Inc.**, from our SWOT analysis example is the following:

| | |
|---|---|
| **PURPOSE** | "To increase the visibility of Small Business Owners" |
| **ACTION** | "by developing state of the art Websites" |
| **RESOLVE** | "because small business owners deserve to have access to their potential clients."<br>*(tip: You can level up your resolve by having 3 to 10 reasons why you are committed to this Mission).* |

On the next page is a chart that shows how you can apply this formula to your own business or project.

| | ANSWERS THE QUESTION: | CAN BE EXPRESSED BY: | |
|---|---|---|---|
| PURPOSE | What do you want to Achieve and for whom do you Exist ? | To increase __of/for ___<br>To decrease __of/for__<br>To enhance __of/for__<br>To end ____of/for____ | To support __of/for__To improve __of/for __To save __of/for ___To provide __of/for_ |
| ACTION | What activities will you perform to achieve your purpose? | "by"<br>"through"<br>"via"<br>"with" | "leveraging"<br>"using"<br>"employing"<br>"utilizing" |
| RESOLVE | Why are you **Committed** to performing the **Actions** that will achieve your **Purpose?** | "Because" | |

Please note that the words used in this chart to express purpose, action, and resolves are a guideline, so you are free to use words that are ore conducive to the mission statement that you've created. Below are some other examples so that you can use the business tool on your own:

I. Personal Growth Coach

**Purpose**: To empower individuals to live with confidence and purpose.
**Action**: By providing mindset coaching and accountability systems.
**Resolve**: Because everyone deserves to walk in the freedom of their true identity.

**Mission Statement**

*Tĩ ɣẖ‰ ồĩ û ḅớ individuals to live with confidence and purpose ạự providing mindset coaching and accountability systems ạḅắảở everyone deserves to walk in the freedom of their identity.*

---

II. Therapist

**Purpose**: To support the emotional well-being of individuals and families
**Action**: Through compassionate counseling and evidence-based practice
**Resolve**: Because healing creates stronger, healthier communities.

**Mission Statement**

*Tĩ ɣẖắồĩ ớ the emotional well-being of individuals and families ɪềđ ắẹễ‰ compassionate counseling and evidence-based practice ạḅắảở healing creates stronger, healthier communities.*

### III. Student

**Purpose**: To enhance my understanding and skills for a meaningful career in public service.

**Action**: With disciplined study, mentorship, and community engagement.

**Resolve**: Because learning is the foundation for making lasting change.

**Mission Statement**

*Tľ %ị ễạ ặị my understanding and skills for a meaningful career in public service ủ gễ ‰ disciplined study, mentorship, and community engagement ạặăšọ %‰ arning is the foundation for making lasting change.*

---

### IV. Educator

**Purpose**: To increase student engagement and curiosity about the world.

**Action**: With creative teaching methods and inclusive classroom experiences.

**Resolve**: Because every child deserves to discover their potential.

**Mission Statement**

*Tľ %ğặạ ọ %‰ udent engagement and curiosity about the world ủ gễ ‰ ative teaching methods and inclusive classroom experiences ạặăšọ %‰ very child deserves to discover their potential.*

---

### V. Healthcare Professional

**Purpose**: To enhance the quality of patient care for underserved populations.

**Action**: By providing accessible, compassionate, and culturally sensitive treatment.

**Resolve**: Because everyone has the right to health and dignity.

**Mission Statement**

*Tľ ị ễạ ặị %‰ quality of patient care for underserved populations ự providing accessible, compassionate, and culturally sensitive treatment ạặăšọ %‰ veryone has the right to health and dignity.*

On the next page of this section, you will be given a worksheet so that you can create your own personalized mission statement. We will use our sample company **ABC Web Company, Inc.** to show you how to use the worksheet.

**Example:**

# MISSION STATEMENT WORKSHEET

## Instructions

Use this worksheet to craft your own Mission Statement using the **Purpose ˜ Action ˜ Resolve** formula. Each section includes guiding questions and examples.

## 1. PURPOSE

**Question:** What do you want to achieve and for whom do you exist?

We want to increase the visibility of small business owners.

| CAN BE EXPRESSED BY |
|---|
| To increase ___of/for ___ |
| To decrease ___of/for___ |
| To enhance __of/for__ |
| To end ____of/for ——— |
| To support __of/for___ |
| To improve ___of/for ___ |
| To save ___of/for ____ |
| To provide ___of/for__ |

---

## 2. ACTION

**Question:** What activities will you perform to achieve your purpose?

By developing state of the art websites.

| CAN BE EXPRESSED BY |
|---|
| "by" |
| "through" |
| "via" |
| "with" |
| "leveraging" |
| "using" |
| "employing" |
| "utilizing" |

---

## 3. RESOLVE

**Question:** Why are you committed to performing the actions that will achieve your purpose?

Because they deserve visibility.
Because they need access to potential clients
Because "if you're not online then you get left behind"

| CAN BE EXPRESSED BY |
|---|
| "because" |

# 4. PUT IT ALL TOGETHER

Combine your Purpose, Action, and Resolve into one flowing mission statement.




To increase the visibility of Small Business Owners by developing state of the art websites because small business owners deserve to have access to their potential clients.

---

# 5. REFLECTION

⇒ Does your mission clearly state who you serve and why?

☑ YES

☐ NO

⇒ Does your mission  inspire action and communicate your values?

☑ YES

☐ NO

⇒ Does your mission remind you of why you are committed to this journey?

☑ YES

☐ NO



# YOUR TURN

Use the worksheets on the following page to create your own **Mission Statement**.

# MISSION STATEMENT WORKSHEET

## Instructions

Use this worksheet to craft your own Mission Statement using the **Purpose ˜ Action ˜ Resolve** formula. Each section includes guiding questions and examples.

## 1. PURPOSE

**Question:** What do you want to achieve and for whom do you exist?

_____

_____

_____

_____

| CAN BE EXPRESSED BY |
| --- |
| To increase ___of/for _ |
| To decrease ___of/for___ |
| To enhance __of/for__ |
| To end _____of/for_____ |
| To support __of/for___ |
| To improve ___of/for ___ |
| To save ___of/for ____ To provide ___of/for_____ |

## 2. ACTION

**Question:** What activities will you perform to achieve your purpose?

_____

_____

_____

_____

| CAN BE EXPRESSED BY |
| --- |
| “by” |
| “through” |
| “via” |
| “with” |
| “leveraging” |
| “using” |
| “employing” |
| “utilizing” |

## 3. RESOLVE

**Question:** Why are you committed to performing the actions that will achieve your purpose?

_____

_____

_____

_____

| CAN BE EXPRESSED BY |
| --- |
| “because” |

# 4. PUT IT ALL TOGETHER

Combine your Purpose, Action, and Resolve into one flowing mission statement.




# 5. REFLECTION

⇒ Does your mission clearly state who you serve and why?

☐ YES

☐ NO

⇒ Does your mission  inspire action and communicate your values?

☐ YES

☐ NO

⇒ Does your mission remind you of why you are committed to this journey?

☐ YES

☐ NO

*And the Lord answered me: "Write the vision; make it plain on tablets, so he may run who reads it.*

**- HABAKKUK 2:2**

## WHAT IS A VISION STATEMENT ?

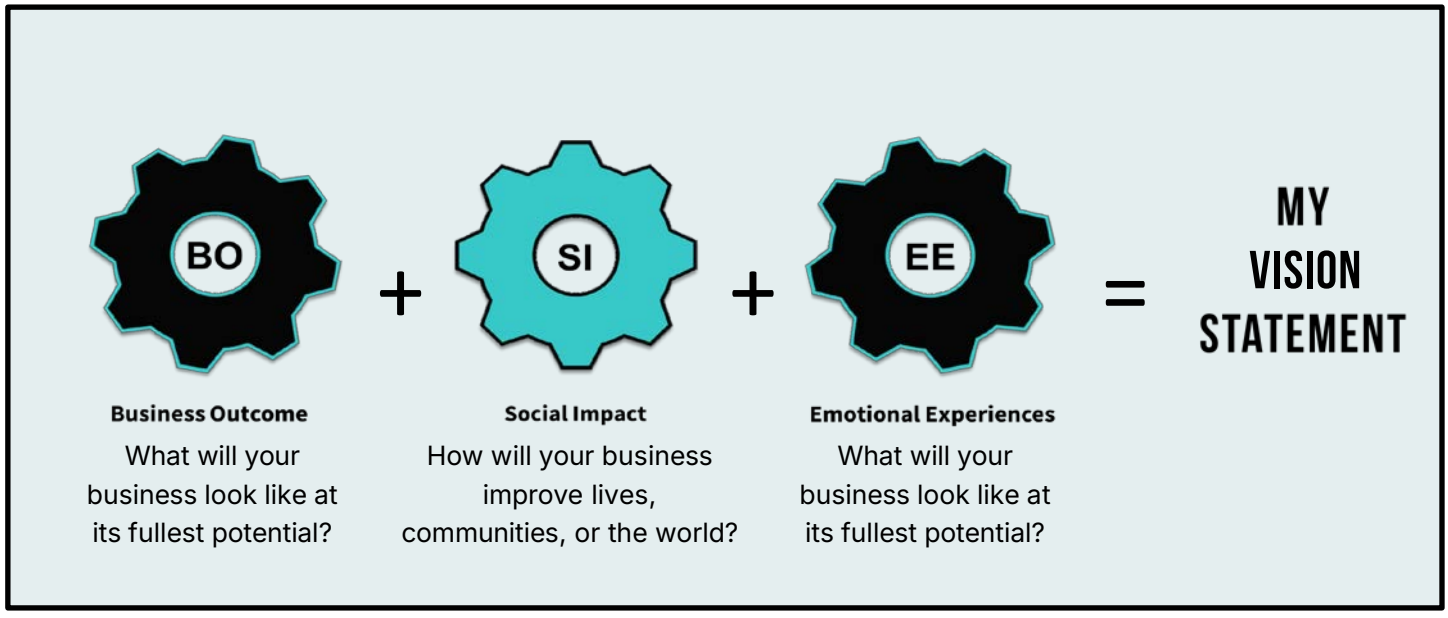
A vision statement is a bold, written picture of the future you're building through your business. It's a declaration of where you're going, who you'll impact, and how the world will be different because of your work.

Your vision serves as the destination your business will reach. Any actions or decisions made that take you away from that destination can be corrected once identified.

The business tool we will be using today is called the **Vision Statement Formula**. It is comprised of a group of questions and templates designed to help you create a vision statement that is personal to you and clearly communicates the power of your business.

Below is a visual representation the **Vision Statement Formula**:

To help you use this formula, on the following pages, I will breakdown each component of the formula. I will provide examples and space for you to build each section of your vision




statement. At the end of this process, you will have your own vision statement that will declare to the world the impact your business plans to make.




## Business Outcome

*Wẽa ı ẓ̈ ğ ụ ť ś ó ẓ̈ ẗ ẗ ğ ḍ ḥ ọ ẽ ẽ ẗ ẗ ḷ ḳ ẓ̈ ḥ ḥ ẓ̈ ẗ ẗ ḥ ḷ ı g ť +*

Your Business Outcome means the specific and measurable success your business will create. Think in terms of growth, revenue, reach, ideal customers, and timeframe.

### Questions You Must Answer:

- Within the next ___years, what will your business become?
- What will you Business name be?
- What type of business are you building?
- Where will you operate or be known?
- What revenue goals will you reach?
- What products/services will you offer?
- Who are your ideal customers?

The following is a template that represents the sentence structure you can use to place your answers. An example will be given to show you how it works.

**BUSINESS OUTCOMES**

Within the next **__X__** years,

+

[ **BUSINESS NAME** ] will grow into one of the most successful [ **DESCRIBE BUSINESS** ], in the world.

+

We will earn [ **REVENUES PER YEAR OR SOCIAL CONDITIONS** ] on [ **DATE** ]

+

by providing [ **PRODUCTS & SERVICES** ] to [ **CUSTOMERS** ].

**Example:**

# BUSINESS OUTCOME WORKSHEET

Instructions

Use this worksheet to craft your own Business Outcome:

1) How long will it take for your business to be what it must become ?

10 years

2) What will your Business name be?

ABC Web Company, Inc.

3) What type of business are you building?

A Web Development Company

4) What revenue goals will you reach?

$850,000

5) Where will you operate or be known?

In The Marketing Industry

6) What products/services will you offer?

User Friendly Websites and Digital Tools

7) Who are your ideal customers?

Businesses who need to represent themselves on the internet

Within the next 10 years, ABC Web Company, Inc. will grow into one of the most successful Web Development Companies in the world. We will earn $850,000 per year and revolutionize the Marketing Industry by providing user friendly websites and digital tools to businesses who need to represent themselves on the internet.



# YOUR TURN

Use the worksheets on the following page to create your own **Business Outcome**.

# BUSINESS OUTCOME WORKSHEET

Instructions

Use this worksheet to craft your own Business Outcomes . We will use the question number to highlight wear your answers should go the template so you can turn it into paragraph format.

1) How long will it take for your business to be what it must become ?

2) What will your Business name be?

3) What type of business are you building?

4) What revenue goals will you reach?

5) Where will you operate or be known?

6) What products/services will you offer?

7) Who are your ideal customers?

## Instructions

Now that you have answered your business outcome questions, you can now write your own paragraph by using the template to fill in each black space with the corresponding question number as shown below:

### TEMPLATE

Within the next *#1* years, *#2* will grow into one of the most successful *#3* in the world. We will earn *#4* per year and revolutionize *#5* by providing *#6* to *#7*.

Write your own paragraph using your answers to the business outcome worksheet and the Business outcome template and example.

### MY BUSINESS OUTCOME




# Social Impact

*Hľ û %ãgï%ļ‰šó%‰ẵg ḥœeg‰òđ úḥ%ġú ḥœ ăľ κ κ šḷ gḡœ ľ ó%ẫḥ%ļ‰đą+*

Social Impact is the meaningful change your business will create beyond just making money. It reflects your mission and purpose.

## Questions You Must Answer:

- What difference will your business make in your community, industry, or customer base?
- How will people's lives improve because your business exists?
- What problems will you help solve?
- Who will feel more empowered, educated, or equipped?

**Example:**

### SOCIAL IMPACT WORKSHEET

1) **What difference will your business make in your community, industry, or customer base?**
   ABC Web Company, Inc. will be responsible for creating a wiser generation of entrepreneurs because they will have access to the best internet tools.

2) **How will people@lives improve because your business exists?**
   Businesses will be armed with the same marketing strategies by fortune 500 companies to grow their business.

3) **What problems will you help solve?**
   This will transform the way businesses sell their products resulting in a lower number of businesses reporting failure after their first five years.

4) **Who will feel more empowered, educated, or equipped?**
   Businesses everywhere will be able to rely on proven digital tools for business growth, creating peace of mind and certainty in starting and growing a business.

5) **Place the answers from 1 - 4 together to form one paragraph.**

ABC Web Company, Inc, will be responsible for creating a wiser generation of entrepreneurs because they will have access to the best internet tools. Businesses will be armed with the same marketing strategies by fortune 500 companies to grow their business. This will transform the way businesses sell their products resulting in a lower number of businesses reporting failure after their first five years. Businesses everywhere will be able to rely on proven digital tools for business growth, creating peace of mind and certainty in starting and building a business.



# YOUR TURN

Use the worksheets on the following page to create your own **Social Impact**.

# SOCIAL IMPACT WORKSHEET

## Instructions

Use this worksheet to craft your own  paragraph describing your businesses Social Impact . Feel free to use extra paper if needed.

1) What difference will your business make in your community, industry, or customer base?

2) How will people@lives improve because your business exists?

3) What problems will you help solve?

4) Who will feel more empowered, educated, or equipped?

5) Place the answers from 1 - 4 together to form one paragraph.




# Emotional Experience

*Wêa1%ãgï g%ãbï%gb%ó%ĺš▪ụĺ šó%šœĺ κ þœ%ąo%ĺš ó%ąaκ û êþ¸ %êþ‰ úgg¸ ĺ¸ ăĺ κ þœ%ó%gb+*

Emotional Experience connects your vision to real human feelings. It's not just about results; it's about the fulfillment those results bring.

**Questions:**

- How will you feel once your business reaches its full potential?
- How do you want your customers to feel when they interact with your brand?
- What will your team or community feel about being part of your success?

**Example:**

## EMOTIONAL EXPERIENCE WORKSHEET

**1) How will you feel once your business reaches its full potential?**

We are grateful and proud of our success in both financial and societal initiatives. Our gratitude comes from the fact that we bring certainty and peace to small business owners.

**2) How do you want your customers to feel when they interact with your brand?**

We give our customers the feelings that come with growth and progress, helping them to feel organized and powerful.

**3) What will your team or community feel about being part of your success?**

Our staff, partners, and other stakeholders are proud of our accomplishments and continually seek to provide more and more value.

**4) Place the answers from 1 - 3 together to form one paragraph.**

We are grateful and proud of our success in both financial and societal initiatives. Our gratitude comes from the fact that we bring certainty and peace to small business owners. We give our customers the feelings that come with growth and progress, helping them to feel organized and powerful. Our staff, partners, and other stakeholders are proud of our accomplishments and continually seek to provide more and more value.



# YOUR TURN

Use the worksheets on the following page to create your own **Emotional Experience**.

# EMOTIONAL EXPERIENCE WORKSHEET

Instructions

Use this worksheet to craft your own  paragraph describing your businesses Emotional Experience .

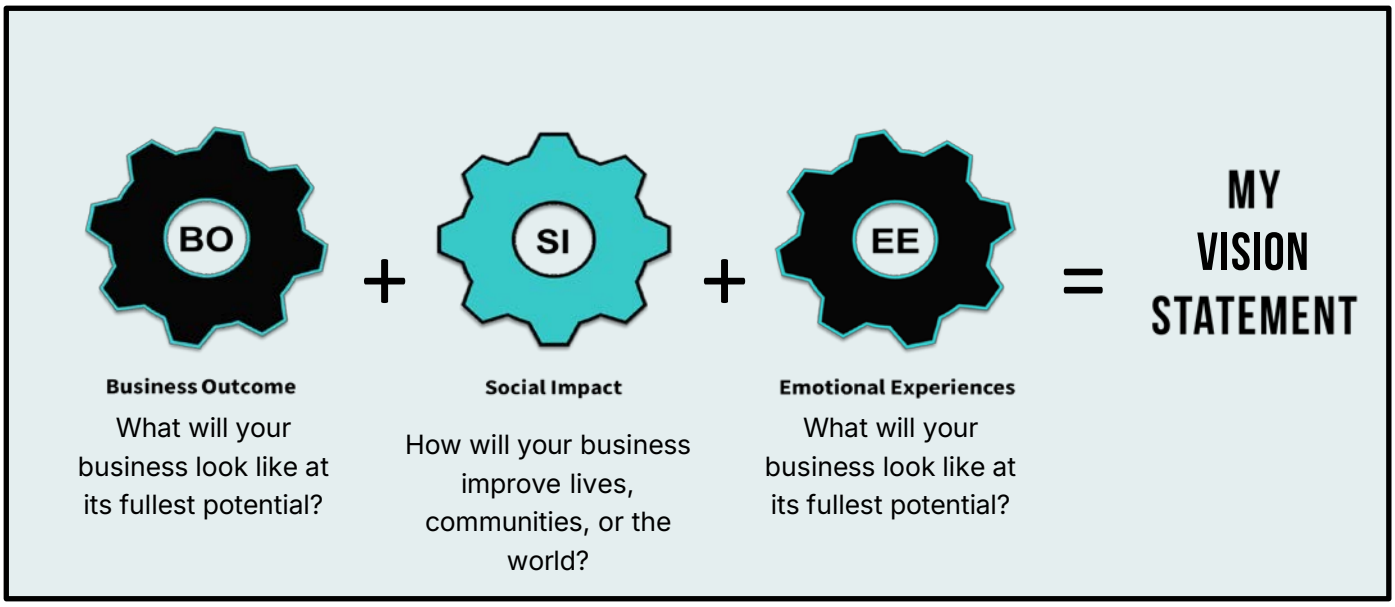
1) How will you feel once your business reaches its full potential?

2) How do you want your customers to feel when they interact with your brand?

3) What will your team or community feel about being part of your success?

4) Place the answers from 1 - 3 together to form one paragraph.

# PUTTING IT ALL TOGETHER




**Example:**

ABC Web Company, Inc.

Vision Statement




Within the next 10 years, ABC Web Company, Inc. will grow into one of the most successful Web Development Companies in the world. We will earn $950,000 per year and revolutionize the Marketing Industry by providing user friendly websites and digital tools to businesses who need to represent themselves on the internet.




We will be responsible for creating a wiser generation of entrepreneurs because they will have access to the best internet tools. Businesses will be armed with the same marketing strategies by fortune 500 companies to grow their business. This will transform the way businesses sell their products resulting in a lower number of businesses reporting failure after their first five years. Businesses everywhere will be able to rely on proven digital tools for business growth, creating peace of mind and certainty in starting and building a business.




We are grateful and proud of our success in both financial and societal initiatives. Our gratitude comes from the fact that we bring certainty and peace to small business owners. We give our customers the feelings that come with growth and progress, helping them to feel organized and powerful. Our staff, partners, and other stakeholders are proud of our accomplishments and continually seek to provide more value.



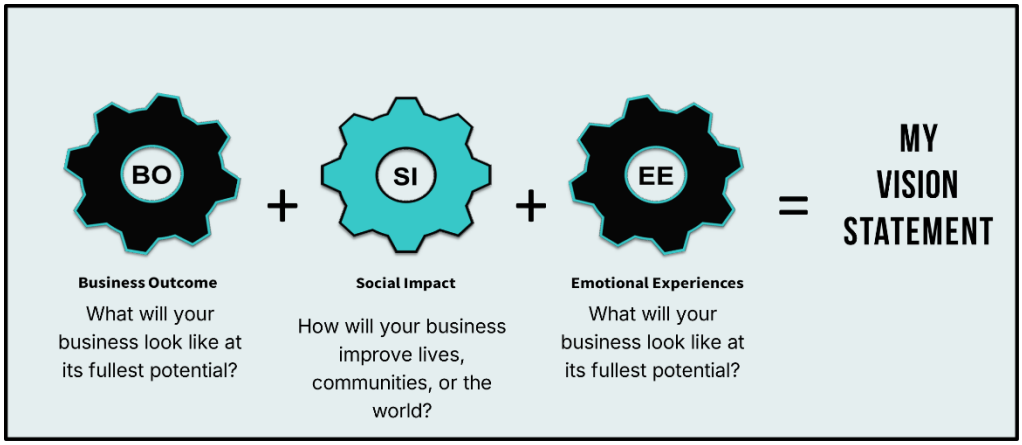
# YOUR TURN

Use the worksheets on the following page to create your own **Vision Statement**.

# VISION STATEMENT WORKSHEET

## Instructions

Use this worksheet to integrate the 3 paragraphs from your Business Outcome, Social Impact, and Emotional Experience worksheets . Once you've combined your answer, you will have created the initial draft of your Vision Statement. Congratulations!




## MY VISION STATEMENT

*The rain came down, the streams rose, and the winds blew and beat against that house; yet it did not fall, because it had its foundation on the rock.*

**- Matthew 7:25**

A business description explains how your business will accomplish its mission and reach its vision. Whether you're a one-person operation or leading a full team, it is your business' foundation and is built on three essential pillars:

| | |
|---|---|
| **Operations** | How your business creates and delivers value through its inputs and activities that turn Ideas into income. |
| **Marketing** | How your business attracts, communicates with, and serves its customers by translating your mission and vision into messages that reach your right audience. |
| **Finances** | How your business will sustain itself through the management of resources, budgeting, and measuring profitability and growth. |

To help you create your business description, we will focus on some simple business strategies that we will turn into business tools to help you create the foundation of your business.

| Pillar | Business Tool | Description |
|---|---|---|
| **Operations** | **Value Chain Model** | How we will get the product or services from us to the customer. |
| **Marketing** | **Ideal Customer Strategy** | How to get the attention of the right customer. |
| **Finances** | **Profit Model Formula** | How to manage the business so that it is sustainable and profitable. |

Our goal is to understand is that our business' effectiveness depends on how we manage Operations, Marketing and Finances because thy are the foundation of our business. This idea is expressed in the following illustration:

**THE THREE PILLARS OF BUSINESS**




MY BUSINESS
OPERATIONS
MARKETING
FINANCE

# THE VALUE CHAIN MODEL

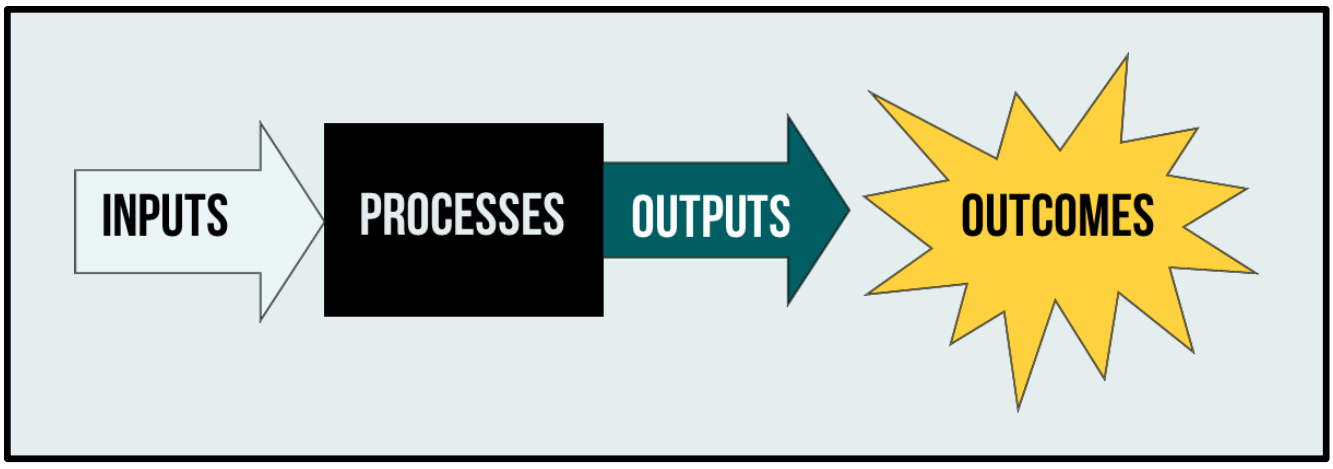
Operations focuses on producing and delivering value. To do this consistently a business must understand it Value Chain Model.

A Value Chain Model is a business framework that describes the series of activities a company performs to create value for its customers. Its important because it helps a business:

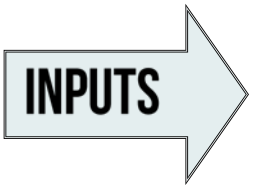
- Understand how it creates value
- Find inefficiencies
- Improve quality
- Manage costs
- Align operations with the business's mission and strategy

To help you identify and create your own value chain, we review each component of a value chain model so that you can begin to create an infrastructure that will support your business as you grow.

Below is a diagram of the components that make up a value chain:




In the following pages you will learn how you use inputs and processes to create outputs that produce the desired outcome that your customers value.




Inputs are the resources you use to create your product or service. They are what you put into your process and are what you need before you can produce value for your customers. They are what flow into your processes to transform your mission into tangible value in the form of outputs which are represented by your products or services.

## COMMON TYPES OF INPUTS

| TYPE OF INPUT | EXAMPLES |
|---|---|
| Materials or Supplies | Design templates, stock images |
| Information or Knowledge | Research, customer feedback, training, content |
| Human Effort | My time, My creativity, My decision-making |
| Capital or Money | Cash, credit, savings, small investments |
| Technology or Tools | Laptop, software (Canva, Zoom, QuickBooks, etc.) |
| Energy or Infrastructure | Home office, Internet connection, Workspace setup |

## KEY QUESTIONS FOR DISCOVERING INPUTS:

1) What tools, software, or materials do you rely on?
2) What information or data do you need to do your job well?
3) How much time do you typically spend creating or delivering your service?
4) What skills or strengths do you personally bring to your work?
5) What costs are necessary to keep your business operating?
6) What past experiences give you unique perspective or authority?
7) What suppliers, contractors, or vendors do you depend on?

**Example:**

| | |
|---|---|
| Name: | ABC Web Company, Inc. |
| Business Type: | Web Development |
| Business Mission: | To empower small businesses by creating brand awareness using state of the art internet products because web services will give them the edge they need in a competitive environment. |

## ABC Web Company, Inc. Inputs:

1) What tools, software, or materials do you rely on?

   Computer, wordpress, CRM, adobe suite,

2) What information or data do you need to do your job well?

   Technology trends, Web security trends,

3) How much time do you typically spend creating or delivering your service?

   2 to 3 weeks

4) What skills or strengths do you personally bring to your work?

   8 years of Web design, 12 years of graphic design

5) What costs are necessary to keep your business operating?

   Software, hardware, memberships , and subscriptions

6) What past experiences give you unique perspective or authority?

   12 years of creating brand awareness for large businesses

7) What suppliers, contractors, or vendors do you depend on?

   Adobe, Microsoft, wordpress, CRMs, printing services



# YOUR TURN

Use the worksheets on the following page to create your own **Inputs Worksheet**.

# INPUTS WORKSHEET

## Instructions

Answer the following questions in order to discover your own Inputs .

1) What tools, software, or materials do you rely on?

2) What information or data do you need to do your job well?

3) How much time do you typically spend creating or delivering your service?

4) What skills or strengths do you personally bring to your work?

5) What costs are necessary to keep your business operating?

6) What past experiences give you unique perspective or authority?

7) What suppliers, contractors, or vendors do you depend on?

# PROCESSES

A process is a series of repeatable steps or activities that turn your inputs into outputs for your customers. It is how you get things done consistently and efficiently. Processes are what turn your business idea into a repeatable operation.

---

## Understanding your process will benefit you because:

- It keeps you organized
- It will reduce chaos
- It makes sure things get done the same way every time
- It builds systems that you can delegate or automate later in your journey
- It saves time and energy while improving quality

## How to Build a Process

A process is the way you break down, step by step, how you do something, so that it can be done repeatedly with the same quality, especially when you're not the one doing it. The steps (or "process") for creating a process is the following:

1. **Identify the goal** – What result or outcome are you trying to achieve?
2. **List every step** – What are the actions you take to reach that outcome.
3. **Put the steps in order** – What is the sequence of the actions that you must take to reach the outcome
4. **Assign tools and resources needed for each step** – What do I need to make each action happen?
5. **Test and improve** – After executing the process what went well, what went wrong, and where can we improve?
6. **Document it** – How can I describe it so that I can repeat and delegate it later.

## COMMON TYPES OF PROCESSES

Below are some typical processes some companies use in there day to day processes. Please feel free to let is inspire you as you think about your own processes.

| PROCESS NAME | PURPOSE | EXAMPLE |
|---|---|---|
| Service Delivery | How you deliver your core product or service | 1st Session Client Meeting Template |
| Product Creation | How you design, build, or package what you sell | Creating an website commercial, writing a brochure |
| Quality Control | How you review and maintain consistency | Reviewing client deliverables before sending → proofreading before publishing |
| Client Onboarding | How new clients start working with you | Send welcome email → collect info → schedule session → send invoice |
| Client Offboarding | How you wrap up projects or services | Deliver final work → request testimonial → close files → send thank-you |
| Lead Generation | How you find or attract new customers | Weekly social posts → free download → email sign-up |
| Sales Process | How you convert leads into clients | Discovery call → proposal → follow-up → close sale |
| Content Creation | How you plan, write, and publish consistent content | Batch write → design in adobe → schedule in Social Media Platform |
| Email Marketing | How you nurture relationships through email | Create sequence → automate → track open rates |
| Customer Feedback | How you gather and use customer input | Send survey → review results → adjust offers |
| Lead Generation | How you find or attract new customers | Weekly social posts → free download → email sign-up |
| Invoicing & Payment | How you bill clients and collect payments | Send invoice → track payment → send receipt |
| Bookkeeping | How you record and organize financial data | Log transactions weekly → reconcile bank statements monthly |
| Expense Management | How you track and control spending | Keep receipts → categorize in QuickBooks or Wave |
| Planning /Goal Setting | How you define direction and objectives | Quarterly review → set goals → plan next steps |
| Learning & Development | How you improve your skills or knowledge | Take one course per quarter → apply new tools |

**Example:**

| | |
|---|---|
| Name: | ABC Web Company, Inc. |
| Business Type: | Web Development |
| Process Name: | Client Onboarding Process |

**ABC Web Company, Inc. Processes:**

1) **Identify the goal – What result or outcome are you trying to achieve?**

   A prepared, confident client who's ready to start.

2) **List every step – What are the actions you take to reach that outcome.**

   Send welcome email and Website Development form, Schedule initial call, Create client folder, Set up billing, and scheduling next meeting

3) **Put the steps in order – What is the sequence of the actions that you must take to reach the outcome?**

   1. Send welcome email and Website Development form
   2. 2.Schedule initial call
   3. Create client folder
   4. Set up billing
   5. scheduling next meeting

4) **Assign tools and resources needed for each step – What do I need to make each action happen?**

   New client information, Form template, Calendar

5) **Test and improve – After executing the process what went well, what went wrong, and where can we improve?**

   What went well? – "Client understanding of agreement"

   What went wrong? – "Client was note prepared for the meeting"

   where can we improve? – "Provide and accountability check list for future meetings."

6) **Document it – How can I describe it so that I can repeat and delegate it later.**

   To insure the client is prepared, confident and ready to start, we will implement the ABC Company Inc, Client Onboarding Process by doing the following:

   Step 1: Send welcome email and intake form

   Step 2: Schedule kickoff call

   Step 3: Create client folder

   Step 4: Set up billing and schedule next meeting



# YOUR TURN

Use the worksheets on the following page to create your own **Processes Worksheet**.

# PROCESSES WORKSHEET

## Instructions

Use this worksheet to discover **each** of your own Processes, feel free to print multiple copies of this worksheet for **each** process you discover or write down your answers on another sheet of paper .

| Process Name: | |
|---|---|

1) Identify the goal – What result or outcome are you trying to achieve?

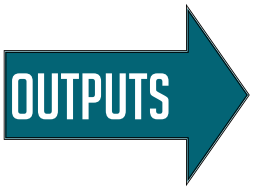
2) List every step – What are the actions you take to reach that outcome.

3) Put the steps in order – What is the sequence of the actions that you must take to reach the outcome?

4) Assign tools and resources needed for each step – What do I need to make each action happen?

5) Test and improve – After executing the process what went well, what went wrong, and where can we improve?

6) Document it – How can I describe it so that I can repeat and delegate it later.




Outputs are the tangible results, products, or services that are produced when a business uses its inputs and processes. They are what your customer receives, uses, or experiences as the result of your operations. Outputs are the things your business produces that represent delivered value. They are the finished results or deliverables your business produces. They are  the evidence that your processes create real value for your customers.

## COMMON TYPES OF OUTPUTS

Below are some typical outputs some companies produce because of their inputs and processes:

| TYPE OF OUTPUT | DESCRIPTION | EXAMPLES |
|---|---|---|
| **Physical Outputs** | Tangible products or items that customers can touch, use, or keep | Handmade products, books, merchandising, packaging, printed materials |
| **Digital Outputs** | Electronic or virtual deliverables created or shared online | eBooks, PDFs, videos, websites, graphics, online courses |
| **Service Outputs** | Experiences or actions performed for or with a client | Coaching sessions, therapy appointments, consulting calls, workshops |
| **Knowledge Outputs** | Information, strategies, or insights that add intellectual value | Reports, plans, frameworks, presentations, guides |
| **Creative Outputs** | Artistic or expressive works that represent creativity or innovation | Brand designs, photography, writing, music, film |
| **Event Outputs** | Organized experiences that bring people together or create | Webinars, conferences, live trainings, support groups |
| **Support Outputs** | Resources or communications that maintain relationships and | Follow-up emails, progress check-ins, customer service replies |
| **Social Outputs** | Initiatives that create shared impact or belonging | Awareness campaigns, volunteer programs, online communities |

## KEY QUESTIONS FOR DISCOVERING OUTPUTS:

1) What do you create, deliver, or produce as a result of your work?

2) What does your customer or client walk away with after working with you?

3) Are your outputs physical , digital, service-based, knowledge based, creative, event based, support or social in nature?

4) What transformation, change, or learning do they experience?

5) What promise or result do you consistently deliver to your customers?

6) How does your output make life better or easier for your customer?

7) What problem does your output solve?

**Complete the following statement:**

"I produce _____,that help people _____."

**Example:**

| | |
|---|---|
| Name: | ABC Web Company, Inc. |
| Business Type: | Web Development |

**ABC Web Company, Inc. Outputs:**

1) What do you create, deliver, or produce as a result of your work?
   user-friendly websites designed to help establish online presence.

2) What does your customer or client walk away with after working with you?
   peace of mind knowing their online platform is aligned with their brand, optimized for performance, and easy to maintain

3) Are your outputs physical , digital, service-based, knowledge based, creative, event based, support or social in nature?
   Our outputs are primarily digital, service-based, and knowledge-based

4) What transformation, change, or learning do they experience?
   From uncertainty about their online presence to clarity, confidence, and readiness.

5) What promise or result do you consistently deliver to your customers?
   A website that not only looks great but functions seamlessly.

6) How does your output make life better or easier for your customer?
   We eliminate the confusion often associated with website projects.

7) What problem does your output solve?
   We solve the problem of poorly executed website projects by providing a clear, guided process that keeps projects on track.

Complete the following statement:

I produce user-friendly websites that help people launch their online presence with confidence, clarity, and efficiency.



# YOUR TURN

Use the worksheets on the following page to create your own **Outputs Worksheet**.

# OUTPUTS WORKSHEET

## Instructions

Use this worksheet to discover your own Outputs .

1) **What do you create, deliver, or produce because of your work?**

2) **What does your customer or client walk away with after working with you?**

3) **Are your outputs physical , digital, service-based, knowledge based, creative, event based, support or social in nature?**

4) **What transformation, change, or learning do they experience?**

5) **What promise or result do you consistently deliver to your customers?**

6) **How does your output make life better or easier for your customer?**

7) **What problem does your output solve?**

## Complete the following statement:

"I produce _____, that help people _____."




Outcomes are the changes, benefits, or impacts that occur because of your outputs. They represent the real-world effects our product, service, or process has on your customers, teams, or a community. Outcomes are what difference your outputs make.

## COMMON TYPES OF OUTCOMES

Below are some typical Outcomes some companies produce as a result of their inputs, processes, and Outputs:

| TYPE OF OUTCOMES | DEFINITION | EXAMPLE |
|---|---|---|
| **Behavioral Outcomes** | Changes in what people *do* or *how they act* after engaging with your business | Clients consistently use the new website to update their own content |
| **Knowledge Outcomes** | Increases in understanding, awareness, or skills | Clients understand how to manage their online content or analytics |
| **Emotional Outcomes** | Changes in how people *feel* after engaging with your work | Clients feel more confident, less overwhelmed, or more motivated |
| **Social Outcomes** | Improved relationships, networks, or community connections | Business owners connect with new audiences through their site |
| **Operational Outcomes** | Improvements in how a business functions internally | A small business operates more efficiently after automation |
| **Financial Outcomes** | Tangible economic benefits or cost savings | Increased sales from better online visibility |
| **Brand Outcomes** | Changes in perception, reputation, or recognition | The business appears more credible and professional online |
| **Customer Outcomes** | Improvements in client experience or satisfaction | Customers find it easier to navigate and contact the business |
| **Learning & Development Outcomes** | Growth in personal or professional capability | The entrepreneur gains new technical and strategic skills |
| **Societal Outcomes** | Broader positive impact on community or industry | The business raises awareness for ethical or inclusive practices |

## KEY QUESTIONS FOR DISCOVERING OUTCOMES:

1. After your client receives your output, what happens next?
2. What do your customers do differently because of your product or service?
3. What new understanding, confidence, or ability do they gain?
4. How does their business, life, or mindset improve as a result?
5. What emotional or relational benefits (trust, peace of mind, connection) do they experience?
6. What measurable benefits do your clients experience (time saved, revenue gained, stress reduced)?
7. How do these outcomes align with your company’s mission or promise?

**Example:**

| | |
|---|---|
| Name: | ABC Web Company, Inc. |
| Business Type: | Web Development |

ABC Company Outcomes:

1) After your client receives your output, what happens next?

   After receiving their completed website, clients begin using their site to showcase their business, attract visitors, and communicate their brand clearly.

2) What do your customers do differently because of your product or service?

   Customers start engaging more confidently with their online audience.

3) What new understanding, confidence, or ability do they gain?

   They gain a deeper understanding of how their online presence contributes to business growth. They also feel confident managing their website independently.

4) How does their business, life, or mindset improve as a result?

   Their business becomes more credible, more discoverable, and more efficient. They spend less time on repetitive tasks and more time on results. They experience a mindset shift from "I'm not tech-savvy" to "I can manage this."

5) What emotional or relational benefits (trust, peace of mind, connection) do they experience?

   Clients experience peace of mind knowing their website works properly, looks professional, and represents them well.

6) What measurable benefits do your clients experience (time saved, revenue gained, stress reduced)?

   They save time, their visibility increases, their stress decreases, their customer satisfaction improves

7) How do these outcomes align with your company@mission or promise?

   These outcomes align with our mission because the goal is to deliver clarity, confidence, and professional execution which produces a transformation on how clients operate, communicate, and present themselves online.



# YOUR TURN

Use the worksheets on the following page to create your own **Outcomes Worksheet**.

# OUTCOMES WORKSHEET

## Instructions

Use this worksheet to discover your own Outcomes .

1) After your client receives your output, what happens next?

2) What do your customers do differently because of your product or service?

3) What new understanding, confidence, or ability do they gain?

4) How does their business, life, or mindset improve as a result?

5) What emotional or relational benefits (trust, peace of mind, connection) do they experience?

6) What measurable benefits do your clients experience (time saved, revenue gained, stress reduced)?

7) How do these outcomes align with your company@mission or promise?


MY BUSINESS
OPERATIONS
MARKETING
FINANCE

# THE IDEAL CUSTOMER STRATEGY

## Introduction

Marketing is the process of understanding the people you want to help, creating something valuable for them, and communicating that value clearly so they choose to work with you. Marketing is not just advertising, posting on social media, or selling. It is the entire journey of helping someone discover you, trust you, and choose you.

Marketing communicates the value of your offer to the marketplace. It's where you explain what you do, how it helps, why it matters, and the results it delivers. Fundamentally, when approaching the marketplace, the first thing to understand is that people don't buy what you do, they buy what your product or service does for them.

It is important note that the overall goal of marketing is to guide people toward becoming paying customers. Below is a diagram of the marketing Journey:

- Awareness
- Interest
- Decision
- Purchase

Our goal as the owners of our business is to  move people through these stages naturally, not forcefully. To do that, defining the ideal customer is critical because marketing should never be aimed at "everyone." Since our resources are limited, we want to remember that the tighter the focus, the more effective our efforts will be.

In the following pages, we will us the ideal customer strategy to structure your marketing as an ongoing process for understanding your customer, creating value for them, and communicating that value in a way that builds trust and leads to action.

## History

The foundation of the ideal customer strategy comes from marketing scholars like Wendell R. Smith who  introduced the concept of market segmentation in 1956 and Philip Kotler who is considered to be the father of modern marketing. Scholars such as these expanded concepts such as segmentation, targeting, and positioning into a strategic model. This work laid the groundwork for identifying a specific customer type rather than trying to reach "everyone."

The idea evolved further with marketers such as Alan Cooper, who created the concept of user personas. He developed personas to help software teams build products for one specific user, not a vague general audience. His success directly influenced the ideal customer approach.

Today, it's a standard tool used by marketers, founders, product teams, and fortune 500 companies. Their success show us start ups that you can't serve everyone, but you can serve some, exceptionally well.

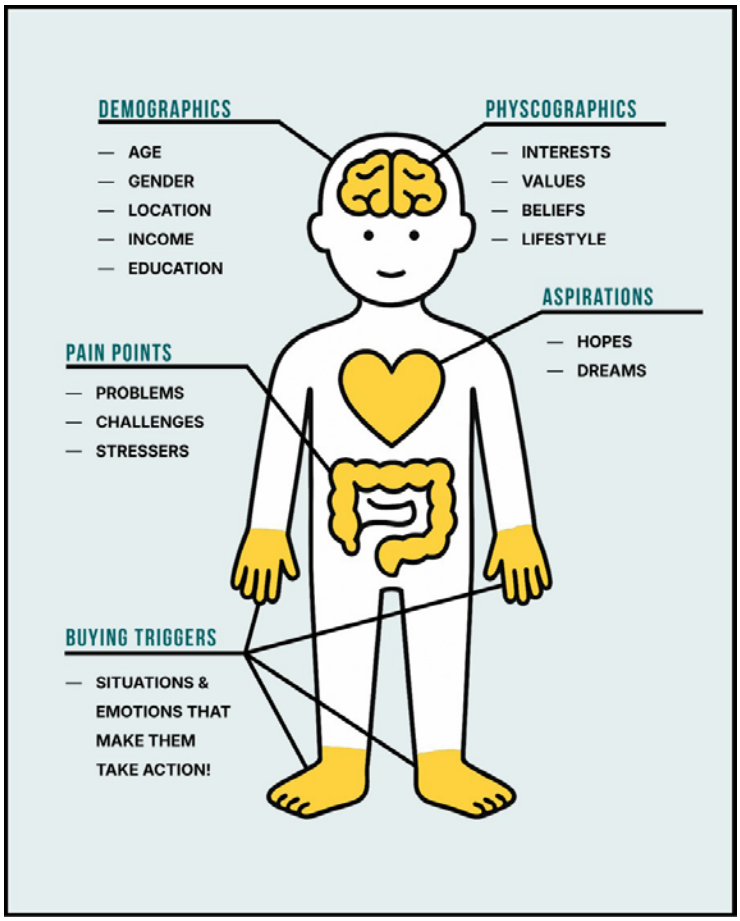
## Defining an ideal customer helps a business with the following:

| | |
|---|---|
| Marketing Clarity | By providing clear messaging, Better offers, More effective ads, Stronger connection with customers |
| Product Decisions | When you know who you serve, You build the right features, design services people want, and avoid wasted time on customers you |
| Saving Money | Targeted marketing costs less and converts better. |
| Customer Satisfaction | Businesses get better outcomes because the services are aligned with the right users. |

Marketing starts with understanding your ideal customer which means knowing Who they are, What they struggle with, What they want, Why they would choose your solution. If you don't understand your customer, how will you know how to help them?

Implementing your ideal customer strategy starts with building your Ideal Customer Profile (ICP). It describes your ideal customer's demographics ,psychographics, pain points, aspirations, and buying triggers. The diagram on the next page will give you a visual explanation of this strategy.

# THE IDEAL CUSTOMER PROFILE CHART




## IDEAL CUSTOMER PROFILE

The above diagram explains the components for building an **Ideal Customer Profile (ICP)**. Each component is represented by a specific body part to make it easy to remember the type of information you are looking for.

| | |
|---|---|
| **Demographics** | Represented by the overall external body and describes a person's Age, gender, location, income, education. |
| **Psychographics** | Represented by the mind and describes a person's Interests, values, beliefs, lifestyle. |
| **Pain Points** | Represented by the gut and describes the problems they face that your product/service solves. |
| **Aspirations** | Represented by the heart and describes what they hope to become or dream that they'd like to achieve. |
| **Buying Triggers** | Represented by the hands and feet because they describe situations or emotions that make them take action. |

# KEY QUESTIONS FOR CREATING YOUR IDEAL CUSTOMER PROFILE

## DEMOGRAPHICS

1) What stage of life is your ideal customer in? (student, professional, retiree, etc.)
2) What common traits do they share? (age range, location, job title, income level, etc.)
3) What environment or setting do they live or work in? (urban, office, freelance, etc.)

## PSYCHOGRAPHICS

1) What does your ideal customer value most? (convenience, quality, status, security, faith, creativity, stability, and/or growth)
2) What attitudes or beliefs shape how they make decisions?
3) What fears, frustrations, or desires influence how they see themselves or the world?

## PAIN POINTS

1) What challenges or problems keep them feeling stuck, overwhelmed, or frustrated?
2) What tasks, responsibilities, or situations do they find difficult or stressful?
3) What do they worry might happen if they don't solve this problem soon?

## ASPIRATIONS

1) What is the big result, transformation, or change they want in their life or business?
2) What goals or dreams motivate them to take action?
3) What would their ideal day, ideal business, or ideal life look like after getting help?

## BUYING TRIGGERS

1) What situation or event makes them realize, "This needs to change now"?
2) What signs show that they are ready to buy (frustration, deadlines, life change, and/or opportunity)?
3) What emotion or need influences them from thinking to deciding ( relief, urgency, clarity, fear, and/or desire) ?

**Example:**

| | |
|---|---|
| **Name:** | ABC Web Company, Inc. |
| **Business Type:** | Web Development |

## ABC Company Ideal Customer Profile:

### DEMOGRAPHICS

1) What stage of life is your ideal customer in?

   They are small business owners, service providers, or early stage entrepreneurs.

2) What common traits do they share?

   Typically ages 28–55, based in the U.S., operating online or locally.

3) What environment or setting do they live or work in?

   They often work solo or with a tiny team and run their business from home.

### PSYCHOGRAPHICS

1) What does your ideal customer value most?

   They value professionalism, credibility, and tools that make work easier.

2) What attitudes or beliefs shape how they make decisions?

   They believe a strong online presence is essential to growth.

3) What fears, frustrations, or desires influence how they see themselves or the world?

   They are motivated by clarity, structure, and the desire to look legitimate.

## PAIN POINTS

1) What challenges or problems keep them feeling stuck, overwhelmed, or frustrated?

They feel overwhelmed by tech, design decisions, and website tools.

2) What tasks, responsibilities, or situations do they find difficult or stressful?

They struggle to create a website that looks professional and converts visitors.

3) What do they worry might happen if they don't solve this problem soon?

They fear losing customers because their current website looks outdated or confusing.

## ASPIRATIONS

1) What is the big result, transformation, or change they want in their life or business?

They want a clean, modern website that attracts clients automatically.

2) What goals or dreams motivate them to take action?

They want to present themselves with confidence online.

3) What would their ideal day, ideal business, or ideal life look like after getting help?

They want a website that helps them scale without extra manual work

## BUYING TRIGGERS

1) What situation or event makes them realize, “This needs to change now”?

They reach a point where their DIY website is embarrassing or costing them leads.

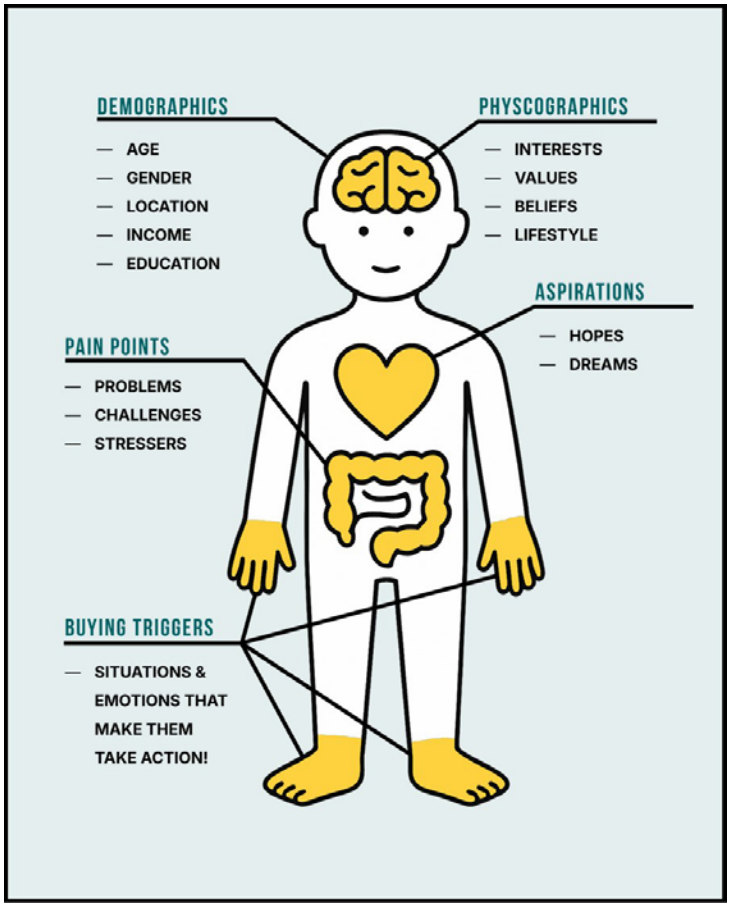
2) What signs show that they are ready to buy ?

They experience a new business launch, rebrand, or growth opportunity.

3) What emotion or need influences them from thinking to deciding ?

They feel urgency when a competitor’s site looks better or when referrals slow down.

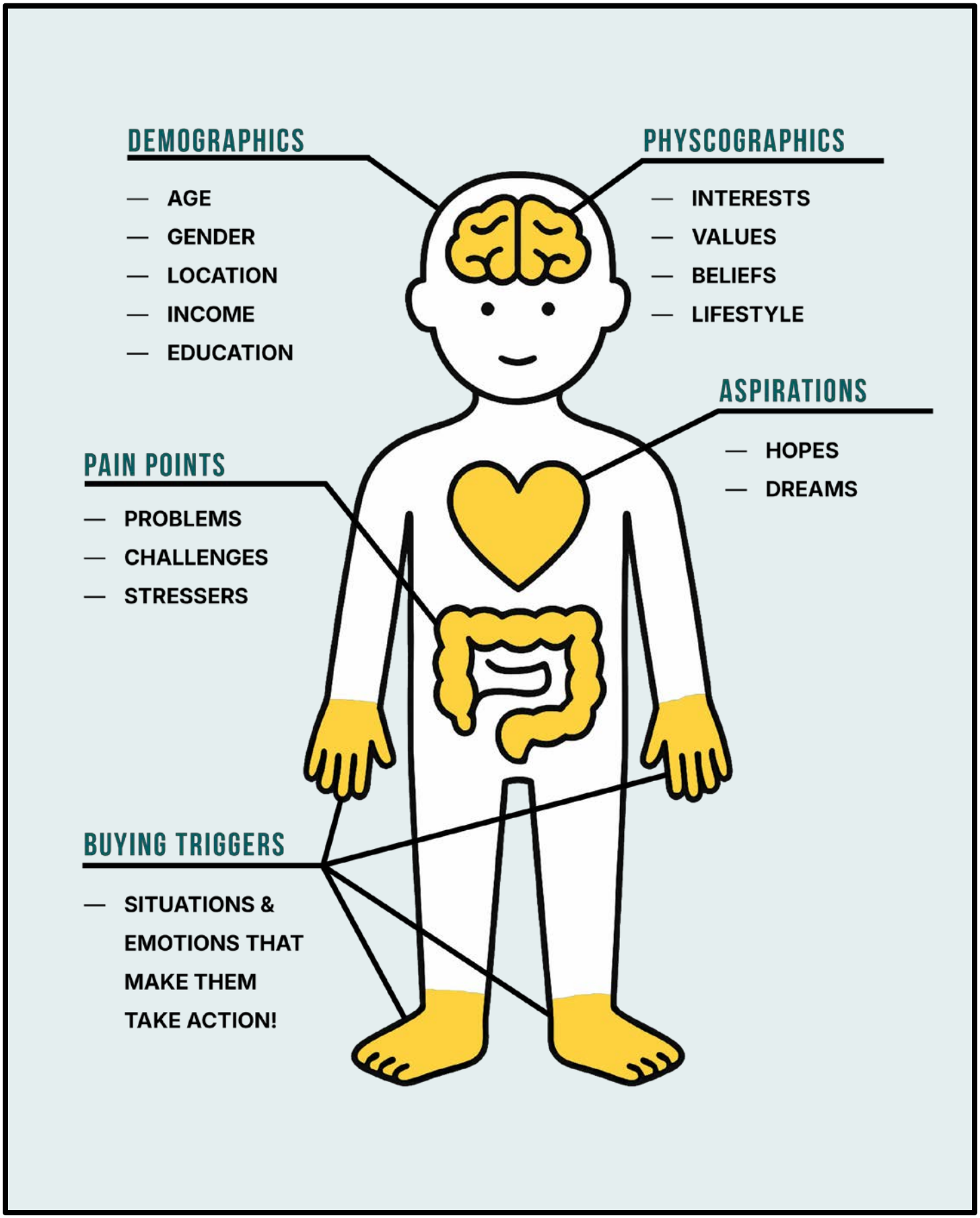
## PAUSE




Now that you have answered the questions of this worksheet, you should have a complete profile of your ideal customer. Please take a minute to review your answers.

Your next step is to give yourself a visual representation of your ideal customer using the diagram on the next page. It will be used to as a road map in preparing your 1st marketing campaign.

# IDEAL CUSTOMER PROFILE TEMPLATE



**Example:**

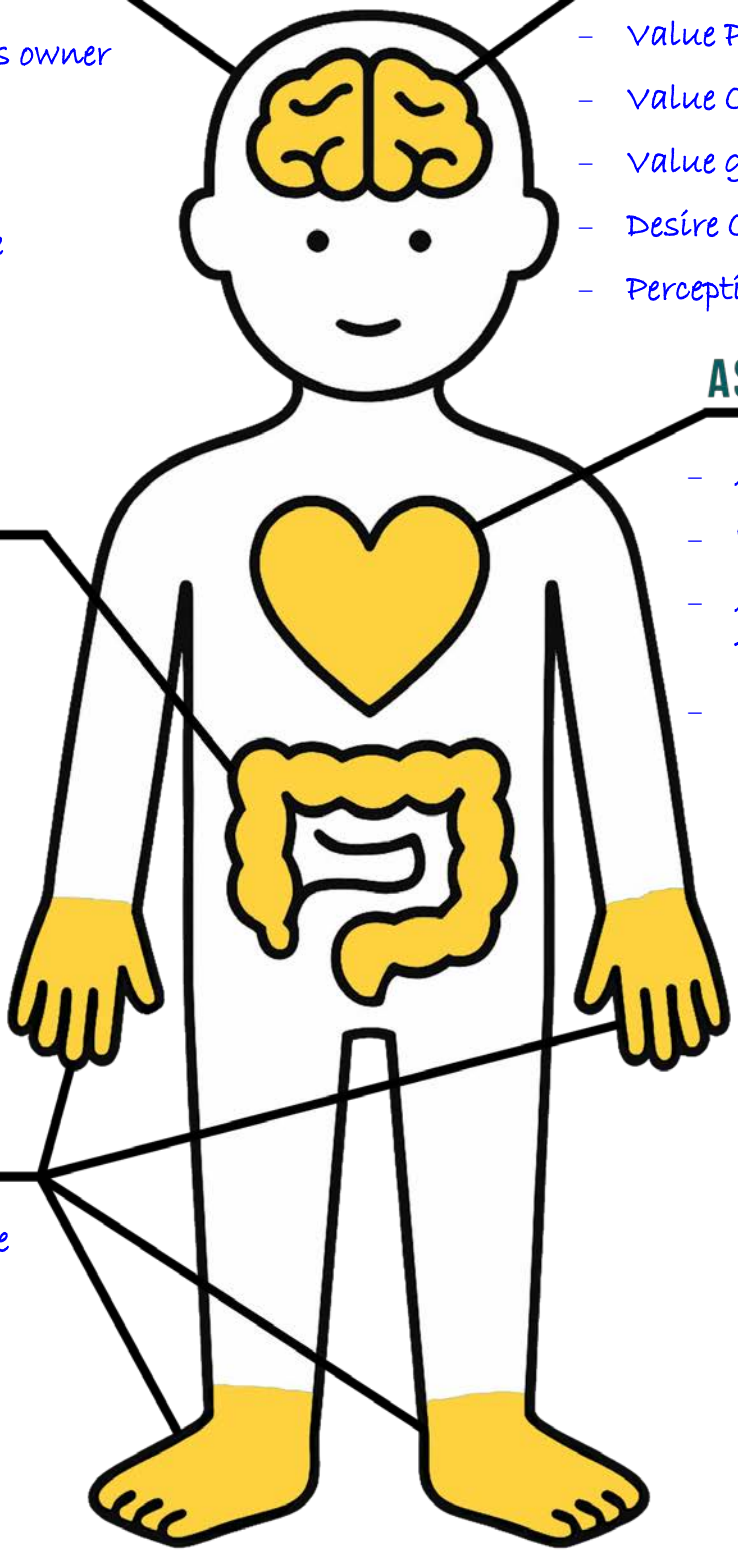
# ABC WEB COMPANY, INC. IDEAL CUSTOMER PROFILE

## DEMOGRAPHICS

- Small business owner
- Early stage
- Age 25 -55
- Operates online
- Works solo

## PHYSCOGRAPHICS

- Value Professionalism
- Value Credibility
- Value growth
- Desire Clarity
- Perception as legitimate



## ASPIRATIONS

- Attract customers
- Website Automation
- An attractive online presence
- User friendly management

## PAIN POINTS

- Overwhelmed by tech
- Struggle with Conversion
- Fear of looking outdated
- Fear of losing customers
- Confused by internet

## BUYING TRIGGERS

- Embarrassing website
- Losing customers
- Growth opportunities
- Low referrals
- Growing competition



# YOUR TURN

Use the worksheets on the following page to create your own **Ideal Customer Profile (ICP)**.

# IDEAL CUSTOMER PROFILE WORKSHEET

## Instructions

Use this worksheet to discover your own Ideal customer profile .

**Ideal Customer Profile for : _____**

### DEMOGRAPHICS

1) What stage of life is your ideal customer in?

2) What common traits do they share?

3) What environment or setting do they live or work in?

### PSYCHOGRAPHICS

1) What does your ideal customer value most?

2) What attitudes or beliefs shape how they make decisions?

3) What fears, frustrations, or desires influence how they see themselves or the world?

## PAIN POINTS

1) What challenges or problems keep them feeling stuck, overwhelmed, or frustrated?

2) What tasks, responsibilities, or situations do they find difficult or stressful?

3) What do they worry might happen if they don't solve this problem soon?

## ASPIRATIONS

1) What is the big result, transformation, or change they want in their life or business?

2) What goals or dreams motivate them to take action?

3) What would their ideal day, ideal business, or ideal life look like after getting help?

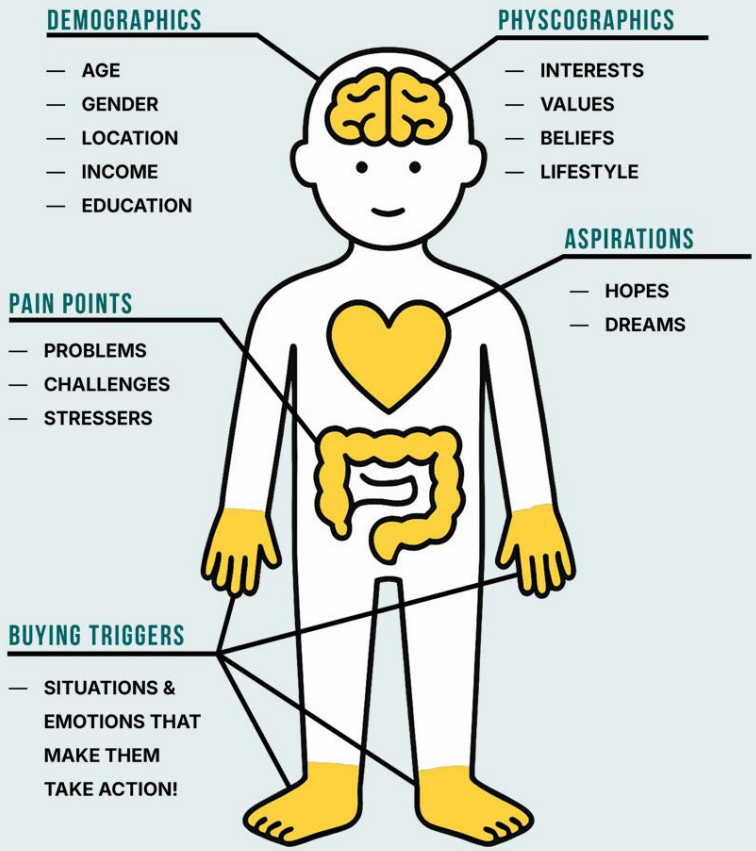
## BUYING TRIGGERS

1) What situation or event makes them realize, “This needs to change now”?

2) What signs show that they are ready to buy ?

3) What emotion or need influences them from thinking to deciding ?

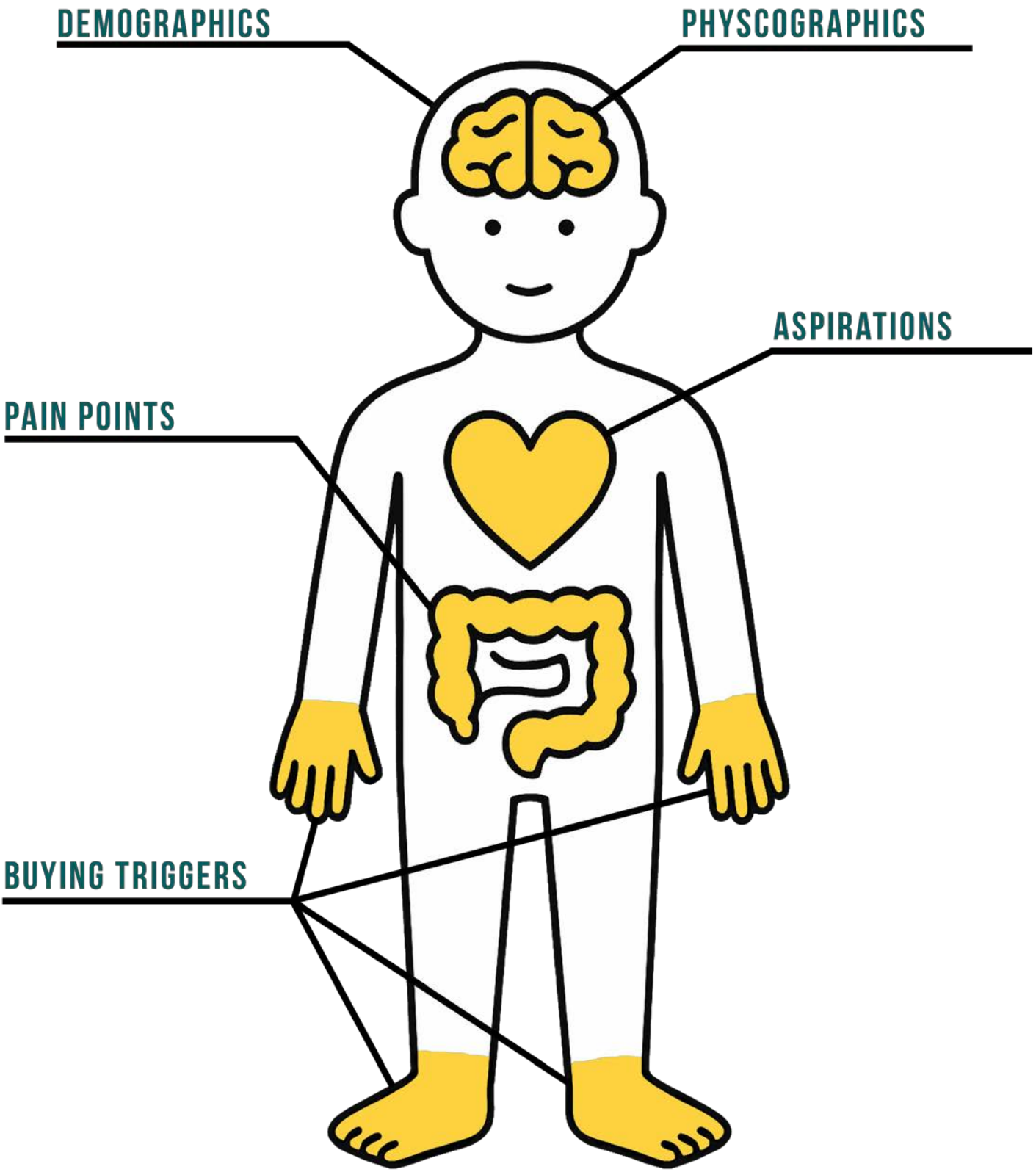
**PAUSE**




Now that you have answered the questions of this worksheet, you should have a complete profile of your ideal customer. Please take a minute to review your answers.

Your next step is to give yourself a visual representation of your ideal customer using the diagram on the next page. It will be used to as a road map in preparing your 1st marketing campaign.

# IDEAL CUSTOMER PROFILE FOR : _____



# USING YOUR ICP TO CREATE A MARKETING CAMPAIGN

To create a marketing campaign, we must Extract the Core Insights we have gained from developing our ICP. BY taking the information from your Ideal Customer Profile, we will know:

- Who the customer is – **Demographics**
- What they value - **Psychographics**
- What they want most – **Aspirations**
- What they're struggling with - **Pain Points**
- What motivates them - **Buying Triggers**

Using these five elements, we will form the foundation of your marketing campaign. The following framework is used as a guide for taking your ICP and creating a marketing campaign that is targeted and effective.

## STEP 1 — BUILD YOUR CORE MESSAGE

A core message is the clear, simple, central idea your brand communicates to your ideal customer. It's the promise, value, and transformation you want them to instantly understand.

It Is a statement that captures:

- What you do
- Who you do it for
- Why it matters

We will Use the ICP insights to create the main message of our campaign using the following formula:

"I help **[DEMOGRAPHICS]** go from **[PAIN POINT]** to **[ASPIRATIONS]** so they can **[Psychographics]**."

Example for a ABC Web Company, Inc.:

"We help **small business owners** turn **outdated websites** into **modern client-attracting machines** so they can **grow with confidence**."

## STEP 2 — CHOOSE YOUR MARKETING OBJECTIVES

Campaigns work best when they have objectives that cover 3 categories:

- **Prospects**
- **Leads**
- **Sales**

The following is a description of each:

| **Prospects** | A person or business that matches your ideal customer profile (ICP) but has not yet engaged with you. |
|---|---|
| **Examples** | • A list of small businesses in your city that need what you provide.<br>• Social media followers who fit your ICP but haven't interacted.<br>• People in Facebook groups or communities who fit your ICP. |

| **Leads** | A prospect who shows interest by taking an action. |
|---|---|
| **Examples** | • Someone who signs up for your email list.<br>• Someone who downloads your free guide.<br>• Someone who books a discovery call.<br>• Someone who messages you with questions. |

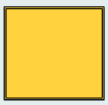
| **Sales** | A lead who buys your product or service. |
|---|---|
| **Examples** | • Someone buys your service package.<br>• Someone signs a contract.<br>• Someone pays for your digital product. |

Choosing your objective across these three categories, rather than just concentrating on sales only  is effective because it ensures that you are creating a relationship with your market even if they do not buy. It makes it so that your future marketing campaigns yield more and more results as you stay consistent with your messaging and the desires of your ideal customer

## STEP 3 — SELECT A CAMPAIGN TYPE

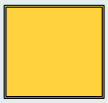
We will use the ICP insights to choose a campaign type that fits your customer's behavior. The campaign type sets the approach and tone in which you will be engaging with your ideal customer. For simplicity we will explain 3 types of campaigns that are commonly executed by small businesses in the beginning phase of their business journey to communicate their value to the customer:

## Typical Campaign Types:



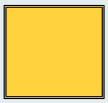
**Problem–Solution Campaign - (based on pain points)**

A Problem–Solution Campaign highlights the specific problem your ideal customer is facing and presents your product or service as the clear, effective solution. It helps prospects quickly understand why they need you and how you resolve their pain.



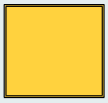
**Before & After Transformation Campaign (based on aspirations)**

This campaign paints a picture of your customer's life before your solution and how it dramatically improves after working with you. It focuses on emotional and practical transformation, helping customers envision their desired future.



**Urgency Campaign - (based on buying triggers)**

An Urgency Campaign motivates your audience to act quickly by emphasizing limited time, limited availability, or the cost of waiting. It's designed to reduce hesitation and create immediate momentum toward a purchase.



**Education / Trust-Building Campaign - (based on psychographics)**

This campaign teaches your audience something valuable so they see you as a credible expert they can trust. By offering insights, tips, or frameworks, it builds confidence in your ability to deliver results.

Pick one based on what motivates your ideal customer.

## STEP 4 — DEVELOP YOUR CONTENT STRATEGY

Messaging that resonates with your ideal customers is critical for any campaign. Leverage ICP insights along with your selected campaign format to craft content that connects with your target audience. The following three areas should be covered in your content:

- Pain Point Content
- Solution Content
- Proof Content

### Common Content Approaches

**Pain Point Content**

Material addressing the primary challenges your ideal customers face

/This is why you have a problem./

**Example**

Data & Statistics

Trend & Reports

**Solution Content**

Material demonstrating how your process or method directly resolves those challenges.

/Here is how we solve that problem./

**Example**

Product/Service Overview

Product/Service Advantages

**Proof Content**

Material providing evidence that validates the effectiveness of your approach

/Here is why our way works./

**Example**

Testimonials

Case Studies

## STEP 5 — BUILD YOUR CALL TO ACTION

A call to action (CTA) is a clear, specific prompt that tells your audience exactly what you want them to do next. Its purpose is to guide people toward the next step in your marketing process by removing guesswork and telling the prospect or lead exactly what you want them to do next. When creating your call to action you must use sentences that increase engagement and turn interest into action. Your CTA  must match the ICP's Pain points, aspirations, and buying triggers.

Some examples of CTA's Are:

| CATEGORY | PURPOSE | EXAMPLES OF CTAS |
|---|---|---|
| **PSYCHOGRAPHICS** | Align the CTA with what the customer believes or prioritizes. | • Start Building What Matters<br>• Create the Freedom You Want<br>• Design a Brand You're Proud Of<br>• Join a Community of Builders |
| **PAIN POINTS** | Encourage action by addressing a problem they want solved now. | • Fix This Today<br>• Get the Support You Need<br>• End the Overwhelm<br>• Make Your Website Finally Work |
| **ASPIRATIONS** | Motivate the customer to take action toward their ideal outcome. | • Start Your Transformation<br>• Step Into Your Next Level<br>• Launch Your Vision<br>• Become the Brand You Imagine |
| **BUYING TRIGGERS** | Leverage urgency, convenience, or incentives that activate conversion. | • Claim Your Limited Spot<br>• Unlock Your Bonus<br>• Get Instant Access<br>• Save Before Prices Increase" |

This is your opportunity to engage with your ideal customer so make sure it is easy for them to contact you. Use the ICP to choose something they will actually say yes to.

## STEP 6 — MAP OUT THE CAMPAIGN

Now it time to create a roadmap for your campaign using all the content you've created so far. This is done by identifying the timeframe of your campaign and then scheduling the posting or publishing of that content.

For this step, we must first choose the marketing platform we will be using to house our content. You want to use marketing platforms which your ideal customer uses frequently. Based on your insights from the ICP, you should have an idea of which communication platforms your ideal customer uses.

**Typical Marketing Platforms are:**

- Social Media ( Facebook, Instagram, YouTube,  TikTok, etc.)
- Email
- Text Messages
- Radio Ads
- TV commercials

Depending on the platform you choose, your campaign and messaging may be formatted differently. To simplify your message, you should us the following format to display your messaging:

- **Headline**
- **Content**
- **Call to Action**

The goal is to create customer awareness and use that opportunity to engage with our ideal customer so that we can add value to their lives.

Once we have aligned our content from the previous steps, we will schedule each engagement by day, week, or month and create a Headline that will gain our ideal customer's attention.

The following is a campaign schedule template that takes your ICP insights and the marketing platform you have decided on and transform them into  a real marketing campaign for your business:

## CAMPAIGN SCHEDULE TEMPLATE

| CONNECTION 1: CORE MESSAGING CONTENT | |
|---|---|
| Purpose: | Introduction of who you are and what you do |
| Directions: | Use the core messaging in step one to introduce who you are and the value/ transformation you provide. The length of this depends on your marketing platform so make sure you use the insights from the ICP.<br>Create a headline and use a Call to Action that focuses on psychographics. |

| CONNECTION 2: PAIN CONTENT # 1 | |
|---|---|
| Purpose: | To show that you understand their main struggle |
| Directions: | Use the content you developed in step four and the insights you've gained from your ICP to engage your ideal customer by identifying their specific problem. Depending on your campaign type, the tone of your messaging can either be educational, transformational, urgent, or information based.<br>Create a headline and use a Call to Action that focuses on pain points. |

| CONNECTION 3: PAIN CONTENT # 2 | |
|---|---|
| Purpose: | To reinforce the urgency of their main struggle |
| Directions: | Use the information from your Pain points to paint a picture of what the future will look like if the problem they are facing is not resolved.<br>Create a headline and use a Call to Action that focuses on pain points. |

## CONNECTION 4: SOLUTION CONTENT

| | |
|---|---|
| Purpose: | To explain how your product/service solves the problem |
| Directions: | This is where you use the solution content you developed in step 4 to highlight how your unique methods and processes will alleviate the challenges they are facing and allow them to have the results they are looking for.<br><br>Create a headline and use a Call to Action that focuses on Aspirations. |

## CONNECTION 5: PROOF CONTENT

| | |
|---|---|
| Purpose: | To build trust by provide evidence of the effectiveness of your solution |
| Directions: | This is where you use the solution content you developed in step 4 to highlight how your unique methods and processes will alleviate the challenges they are facing and allow them to have the results they are looking for.<br><br>Create a headline and use a Call to Action that focuses on Aspirations. |

## CONNECTION 6: CALL TO ACTION CONTENT

| | |
|---|---|
| Purpose: | To influence the audience to take action |
| Directions: | Use the content you developed in step five to direct the customer to the next action they should take. The action they will take depends on the objectives you've set forth in step 2. Depending on your marketing platform, you should make it as easy as possible for the ideal client to engage with you.<br><br>Create a headline and use a Call to Action that focuses on Buying Triggers. |

## CONNECTION 7: : REMINDER/SUMMARY CONTENT

| | |
|---|---|
| Purpose: | To repeat the call to action |
| Directions: | Describe to the audience what taking the next action would look like and how it will lead to the solutions they are looking for.<br><br>Create a headline and use a Call to Action that focuses on Buying Triggers. |

## STEP 7 — EXECUTE & ADJUST

Now that you have a schedule of where and when you will be distributing your marketing content, it is time to execute. As you execute the campaign schedule, it is an opportunity for you to gain real time insight as to whether the information or assumptions you've made in your ICP are correct.

As you monitor the engagement level of your connection efforts, some typical question to ask are the following:

- Did people identify with the pain points?
- Are they receptive to the solution?
- Does the CTA prompt the Ideal Customer to act?
- Are people clear about the value being provided?
- Are there any objections?
- Did I reach my objectives?
- What went well vs What went wrong?
- Using this new insight, where can we improve on the next campaign?

Through the execution of your campaign, you can gather valuable information that can make your next campaign even more effective at creating awareness and engaging with the right people.




On the next page, we will provide you with a worksheet to create your own Marketing campaign. An example will be given to illustrate how a business would go through each step one by one to produce the Marketing Campaign.

**Example:**

# MARKETING CAMPAIGN WORKSHEET

## STEP 1 — BUILD YOUR CORE MESSAGE

Using the following template and your ICP, create your core message:

"I help [DEMOGRAPHICS] go from [PAIN POINT] to [ASPIRATIONS] so they can [PSYCHOGRAPHICS]."

Write your sentence here:

We help small business owners go from outdated websites to state of the art client attracting machines so they can grow with confidence .

## STEP 2 — CHOOSE YOUR MARKETING OBJECTIVES

Choose you objectives across the following categories:

| | |
|---|---|
| Prospects | A person or business that matches your ideal customer profile (ICP) but has not yet engaged with you. |

| NUMBER OF PROSPECTS |
|---|
| 500 |

| | |
|---|---|
| Leads | A prospect who shows interest by taking an action. |

| NUMBER OF LEADS |
|---|
| 100 |

| | |
|---|---|
| Sales | A lead who buys your product or service. |

| NUMBER OF SALES |
|---|
| 10 |

## STEP 3 — SELECT A CAMPAIGN TYPE

Choose a campaign type that fits your customer's behavior.

☑ **Problem–Solution Campaign - (based on pain points)**

A Problem–Solution Campaign highlights the specific problem your ideal customer is facing and presents your product or service as the clear, effective solution. It helps prospects quickly understand why they need you and how you resolve their pain.

☐ **Before & After Transformation Campaign (based on aspirations)**

This campaign paints a picture of your customer's life before your solution and how it dramatically improves after working with you. It focuses on emotional and practical transformation, helping customers envision their desired future.

☐ **Urgency Campaign - (based on buying triggers)**

An Urgency Campaign motivates your audience to act quickly by emphasizing limited time, limited availability, or the cost of waiting. It's designed to reduce hesitation and create immediate momentum toward a purchase.

☐ **Education / Trust-Building Campaign - (based on psychographics)**

This campaign teaches your audience something valuable so they see you as a credible expert they can trust. By offering insights, tips, or frameworks, it builds confidence in your ability to deliver results.

☐ **Other Campaign**

## STEP 4 — CREATE A YOUR CONTENT STRATEGY

Create the content you will use to engage your ideal customer:

| Pain Point Content |
| --- |
| Content that speaks to you ideal customers pain points |

Did you know that 80-90% of business websites are ineffective at generating meaningful leads or conversions? Many businesses still invest in websites that exists but don't grow their business.

| Solution Content |
| --- |
| Content that shows your process or method and how it alleviates the pain points. |

Studies show that well-designed websites can increase conversion rates by up to 200–400% because they immediately capture user attention and guide visitors toward acting.

| Proof Content |
| --- |
| Content that give evidence to why your process or method works |

Our process works, listen to what our clients are saying:

" Within the first month of launching our new website, we saw more inquiries than we had in the previous three months combined. The structure, clarity, and design made all the difference." — Startup Founder

## STEP 5 — BUILD YOUR CALL TO ACTION

Write a Call to Action that engages your ideal customer's psychographics, pain points, aspirations, and buying triggers. ( You can use the examples on page 82.)

| CATEGORY | PURPOSE | MY CTA@ |
|---|---|---|
| **Psychographics** | Align the CTA with what the customer believes or prioritizes. | Invest In Yourself<br>Make Your Mark<br>Build Your Future |
| **Pain Points** | Encourage action by addressing a problem they want solved now. | Upgrade Your Brand Today<br>Get Help Now<br>Fix Your Website Today |
| **Aspirations** | Motivate the customer to take action toward their ideal outcome. | Start Your Transformation<br>Reach Your Next Level Now<br>Launch Your Vision Today |
| **Buying Triggers** | Leverage urgency, convenience, or incentives that activate conversion. | Get Instant Help Today<br>Fix This Now<br>Purchase While Supplies Last |

## STEP 6 — MAP OUT THE CAMPAIGN

I. Choose the marketing platform we will be using to house our content.

- [x] Social Media - Specify: FACEBOOK
- [ ] Email
- [ ] Text Messages
- [ ] Other: _____

II. Choose the number of connections to be made across the specific number of days, weeks, months or years.

7 DAYS

III. Place your content in the following campaign schedule.

| CONNECTION 1 : CORE MESSAGING CONTENT | |
|---|---|
| Headline: | ABC WEB COMPANY , INC. - THE ULTIMATE WEB SOLUTION |
| Content: | Introducing ABC Company, Inc..<br>We help small business owners go from outdated websites to state of the art client attracting machines so they can grow with confidence . |
| Call - to Action: | LEARN MORE. - (Link to Website) |

| CONNECTION 2: PAIN CONTENT # 1 | |
|---|---|
| **Headline:** | THE PROBLEM WITH YOUR WEBSITE |
| **Content:** | Did you know that 80-90% of business websites are ineffective at generating meaningful leads or conversions? Many businesses still invest in websites that exist but don't actually grow their business. |
| **Call - to Action:** | FIX YOUR WEBSITE TODAY |

| CONNECTION 3: PAIN CONTENT # 2 | |
|---|---|
| Headline: | YOUR WEBSITE EXISTS, BUT IT'S NOT WORKING |
| Content: | Have you ever invested time and money into a website that didn't bring in leads, sales, or confidence? Do your visitors leave quickly? Are you embarrassed to share the link?. |
| Call - to Action: | GET HELP NOW |

| CONNECTION 4: SOLUTION CONTENT | |
|---|---|
| Headline: | HOW TO FIX YOUR WEBSITE PROBLEMS |
| Content: | Studies show that well-designed websites can increase conversion rates by up to 400% because they immediately capture user attention and guide visitors toward taking action. |
| Call - to Action: | REACH YOUR NEXT LEVEL NOW |

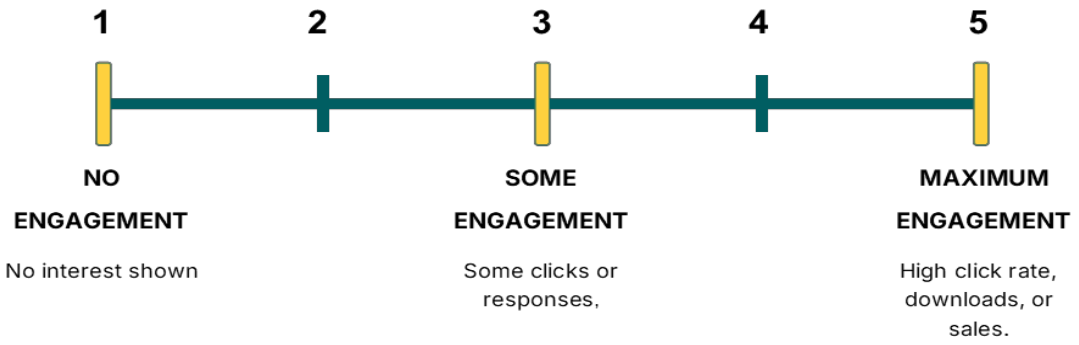
| CONNECTION 5: PROOF CONTENT | |
|---|---|
| Headline: | WHAT OUR CLIENTS HAVE TO SAY |
| Content: | Our process works. One client said the following:<br>" Within the first month of launching our new website, we saw more inquiries than we had in the previous three months combined. The structure, clarity, and design made all the difference." — Startup Founder |
| Call - to Action: | FIX YOUR WEBSITE TODAY |

| CONNECTION 6: CALL TO ACTION CONTENT | |
|---|---|
| Headline: | DO NOT DELAY, GET HELP TODAY! |
| Content: | If your currently experiencing difficulty with you're website , then don't wait until you experience the negative effects.<br>Contact us today for a Free Assessment Call. |
| Call - to Action: | GET INSTANT HELP TODAY |

| CONNECTION 7: : REMINDER/SUMMARY CONTENT | |
|---|---|
| Headline: | WE SOLVE WEBSITE PROBLEMS |
| Content: | Our focus is to turn low converting website into lead conversion machines. If your website struggles to produce the sales you are looking for, Do not hesitate to contact us today! |
| Call - to Action: | START YOUR TRANSFORMATION |

## STEP 7 — EXECUTE & ADJUST

As the campaign is being executed, monitor the engagement level of each connection effort. Use the worksheet to document the effectiveness of the connection effort. Read each question and use the assessment tool to determine the engagement level of the campaign based on the question.  On a scale from 1 to 5 where 1 means no engagement and 5 maximum engagement, rate your answers to the following questions:




| Area Assessed | Assessment Question | Score (1–5) | Indicators |
|---|---|---|---|
| Pain Points | How strongly did the audience engage with the pain points being presented? | 3 | – Comments<br>– Replies<br>– Clicks<br>– saves |
| Solution | How strongly did the audience engage with the your solutions? | 1 | – Time on page<br>– Replies<br>– demo interest |
| CTA Effectiveness | How effectively did the call to action prompt the Ideal Customer to act? | 1 | – Click-through rate<br>– Sales |
| Value Clarity | How clear was the value of the offer to the audience? | 2 | – Questions asked<br>– Objections raised |

*Add up your score from each Assessed area. Divide that answer by 4. This Represents your final score.*

| SCORING INSIGHTS | | |
|---|---|---|
| Score Below 2 | Message/Market Misalignment | Your message does not align with your IC's values. Redo your ICP based on new research. |
| Score ~~£~~–~~₽~~ | Optimization Opportunity | Your message has some effectiveness with your IC. Analyze connection effort and keep what works and change what doesn't |
| Score ~~₽~~–~~€~~ | Scalable Campaign | Ready to repeat and introduce to new prospects. |

## CAMPAIGN GOAL EVALUATION

| OBJECTIVES | TARGET | ACTUAL | GAP |
|---|---|---|---|
| Prospects Reached | 500 | 502 | +2 |
| New Leads | 100 | 19 | -81 |
| Sales | 10 | 0 | -10 |

## EVALUATION QUESTIONS & IMPROVEMENT PLAN

1. **What went well with the connection effort( s)?**
   Our core messaging reached all prospects and was shared to individuals outside of our current followers and there was some interest in our messaging.

2. **What went wrong with the connection effort( s)?**
   There was lower than expected engagement in pain points, solutions, and CTA's resulting in no sales

3. **How can we improve on our pain points messaging ?**
   We need a pain point that the ideal customer is currently experiencing and make them feel that we will result in positive profits.

4. **How can we improve on our solutions messaging ?**
   We must show the customer how our services results in higher profits.

5. **How can we improve on our Call to Action ?**
   Update our current content to illustrate the amount of money an ideal customer can gain when the work with us.



# YOUR TURN

Use the worksheets on the following page to create your own **Marketing Campaign**.

# MARKETING CAMPAIGN WORKSHEET

## STEP 1 — BUILD YOUR CORE MESSAGE

Using the following template and your ICP, create your core message:

"I help [DEMOGRAPHICS] go from [PAIN POINT] to [ASPIRATIONS] so they can [PSYCHOGRAPHICS]."

Write your sentence here:

## STEP 2 — CHOOSE YOUR MARKETING OBJECTIVES

Choose you objectives across the following categories:

| | | |
|---|---|---|
| Prospects | A person or business that matches your ideal customer profile (ICP) but has not yet engaged with you. | NUMBER OF PROSPECTS |
| Leads | A prospect who shows interest by taking an action. | NUMBER OF LEADS |
| Sales | A lead who buys your product or service. | NUMBER OF SALES |

## STEP 3 — SELECT A CAMPAIGN TYPE

Choose a campaign type that fits your customer's behavior.

☐ **Problem–Solution Campaign - (based on pain points)**

A Problem–Solution Campaign highlights the specific problem your ideal customer is facing and presents your product or service as the clear, effective solution. It helps prospects quickly understand why they need you and how you resolve their pain.

☐ **Before & After Transformation Campaign (based on aspirations)**

This campaign paints a picture of your customer's life before your solution and how it dramatically improves after working with you. It focuses on emotional and practical transformation, helping customers envision their desired future.

☐ **Urgency Campaign - (based on buying triggers)**

An Urgency Campaign motivates your audience to act quickly by emphasizing limited time, limited availability, or the cost of waiting. It's designed to reduce hesitation and create immediate momentum toward a purchase.

☐ **Education / Trust-Building Campaign - (based on psychographics)**

This campaign teaches your audience something valuable so they see you as a credible expert they can trust. By offering insights, tips, or frameworks, it builds confidence in your ability to deliver results.

☐ **Other Campaign**

## STEP 4 — CREATE A YOUR CONTENT STRATEGY

Create the content you will use to engage your ideal customer:

### Pain Point Content

Content that speaks to you ideal customers pain points

### Solution Content

Content that shows your process or method and how it alleviates the pain points.

### Proof Content

Content that give evidence to why your process or method works

## STEP 5 — BUILD YOUR CALL TO ACTION

Write a Call to Action that engages your ideal customer's psychographics, pain points, aspirations, and buying triggers. ( You can use the examples on page 82.)

| CATEGORY | PURPOSE | MY CTA@ |
| --- | --- | --- |
| **Psychographics** | Align the CTA with what the customer believes or prioritizes. | |
| **Pain Points** | Encourage action by addressing a problem they want solved now. | |
| **Aspirations** | Motivate the customer to take action toward their ideal outcome. | |
| **Buying Triggers** | Leverage urgency, convenience, or incentives that activate conversion. | |

## STEP 6 — MAP OUT THE CAMPAIGN

I. Choose the marketing platform we will be using to house our content.

- ☐ Social Media - Specify: _____
- ☐ Email
- ☐ Text Messages
- ☐ Other: _____

II. Choose the number of connections to be made across the specific number of days, weeks, months or years.

_____

III. Place your content in the following campaign schedule . ( Use a separate sheet of paper if you need more space.)

| CONNECTION 1 : CORE MESSAGING CONTENT | |
|---|---|
| Headline: | |
| Content: | |
| Call - to Action: | |

| CONNECTION 2: PAIN CONTENT # 1 | |
|---|---|
| **Headline:** | |
| **Content:** | |
| **Call - to Action:** | |

| CONNECTION 3: PAIN CONTENT # 2 | |
|---|---|
| Headline: | |
| Content: | |
| Call - to Action: | |

| CONNECTION 4: SOLUTION CONTENT | |
|---|---|
| Headline: | |
| Content: | |
| Call - to Action: | |

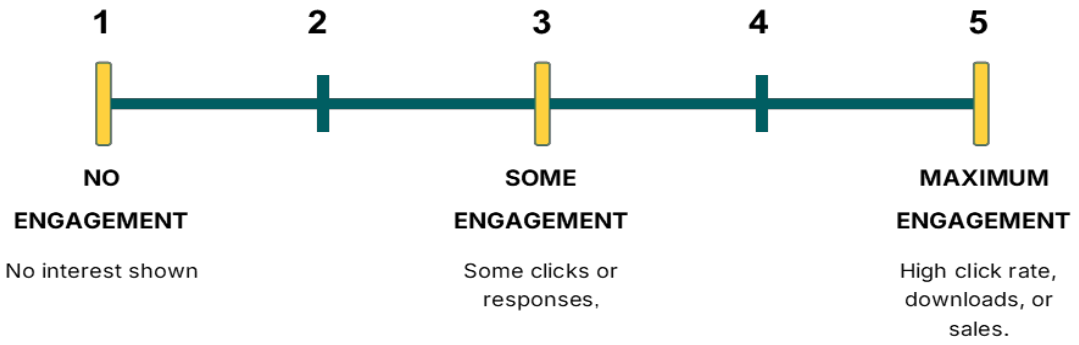
| CONNECTION 5: PROOF CONTENT | |
|---|---|
| Headline: | |
| Content: | |
| Call - to Action: | |

| CONNECTION 6: CALL TO ACTION CONTENT | |
|---|---|
| Headline: | |
| Content: | |
| Call - to Action: | |

| CONNECTION 7: : REMINDER/SUMMARY CONTENT | |
|---|---|
| Headline: | |
| Content: | |
| Call - to Action: | |

## STEP 7 — EXECUTE & ADJUST

As the campaign is being executed, monitor the engagement level of each connection effort. Use the worksheet to document the effectiveness of the connection effort. Read each question and use the assessment tool to determine the engagement level of the campaign based on the question.  On a scale from 1 to 5 where 1 means no engagement and 5 maximum engagement, rate your answers to the following questions:




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| Solution | How strongly did the audience engage with the your solutions? | | – Time on page<br>– Replies<br>– demo interest |
| CTA Effectiveness | How effectively did the call to action prompt the Ideal Customer to act? | | – Click-through rate<br>– Sales |
| Value Clarity | How clear was the value of the offer to the audience? | | – Questions asked<br>– Objections raised |

*Add up your score from each Assessed area. Divide that answer by 4. This Represents your final score.*

| SCORING INSIGHTS | | |
|---|---|---|
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| **Score ~~£~~–~~₽~~** | Optimization Opportunity | Your message has some effectiveness with your IC. Analyze connection effort and keep what works and change what doesn't |
| **Score ~~₽~~–~~€~~** | Scalable Campaign | Ready to repeat and introduce to new prospects. |

## CAMPAIGN GOAL EVALUATION

| OBJECTIVES | TARGET | ACTUAL | GAP |
|---|---|---|---|
| Prospects Reached | | | |
| New Leads | | | |
| Sales | | | |

## EVALUATION QUESTIONS & IMPROVEMENT PLAN

1. What went well with the connection effort( s)?

2. What went wrong with the connection effort( s)?

3. How can we improve on our pain points messaging ?

4. How can we improve on our solutions messaging ?

5. How can we improve on our Call to Action ?


MY BUSINESS
OPERATIONS
MARKETING
FINANCE

FINANCE

# BUSINESS MODEL STRATEGY

Finance focuses on managing the money your business makes so that it supports operations, growth through marketing, and long-term sustainability.

It is the planning, tracking, allocating, and analyzing of financial resources to ensure the business can operate effectively because it's leaders can make informed decisions.

Business model strategy is the process of understanding who you serve, what value you deliver, how you deliver it, how you reach the customer, and how the business creates profits for its shareholders (you).

Based on what we have learned from previous chapters, we should understand who we serve or ideal customer, The Value we deliver or our value chain, how we deliver it or our operation, and how we reach them or our marketing. Now we must understand how the business gets paid by understanding its costs and revenues.

This means we are in great position to use this tool to understand our financial performance and create accountability so that we can run our business by making informed decisions.

The first step in managing our financial resources using the business model strategy is understanding the relationship between Revenue, Costs, and Profits and how to align them with our operations and marketing. The following chart explain this relationship and how it aligns with the rest of our business:

| | |
|---|---|
| REVENUE | The total amount of money a business earns from selling its products or services before any expenses are deducted. It represents the income generated through normal business activities and is the starting point for measuring financial performance. |
| | We get this information from Ideal Customer Profile (ICP). |

| | |
|---|---|
| COST | The total expenses a business incurs to operate and deliver its products or services, including operating, marketing, and delivery expenses.<br>They represent the money that must be spent to create and provide value to customers. |
| | We get this information from Operations Costs and Marketing Costs |

| | |
|---|---|
| PROFIT | The money that remains after all costs is subtracted from revenue. It represents the financial gain of the business and indicates whether the business model is sustainable and successful. |
| | We get this information as a result of subtracting Cost from Revenue. |

REVENUE

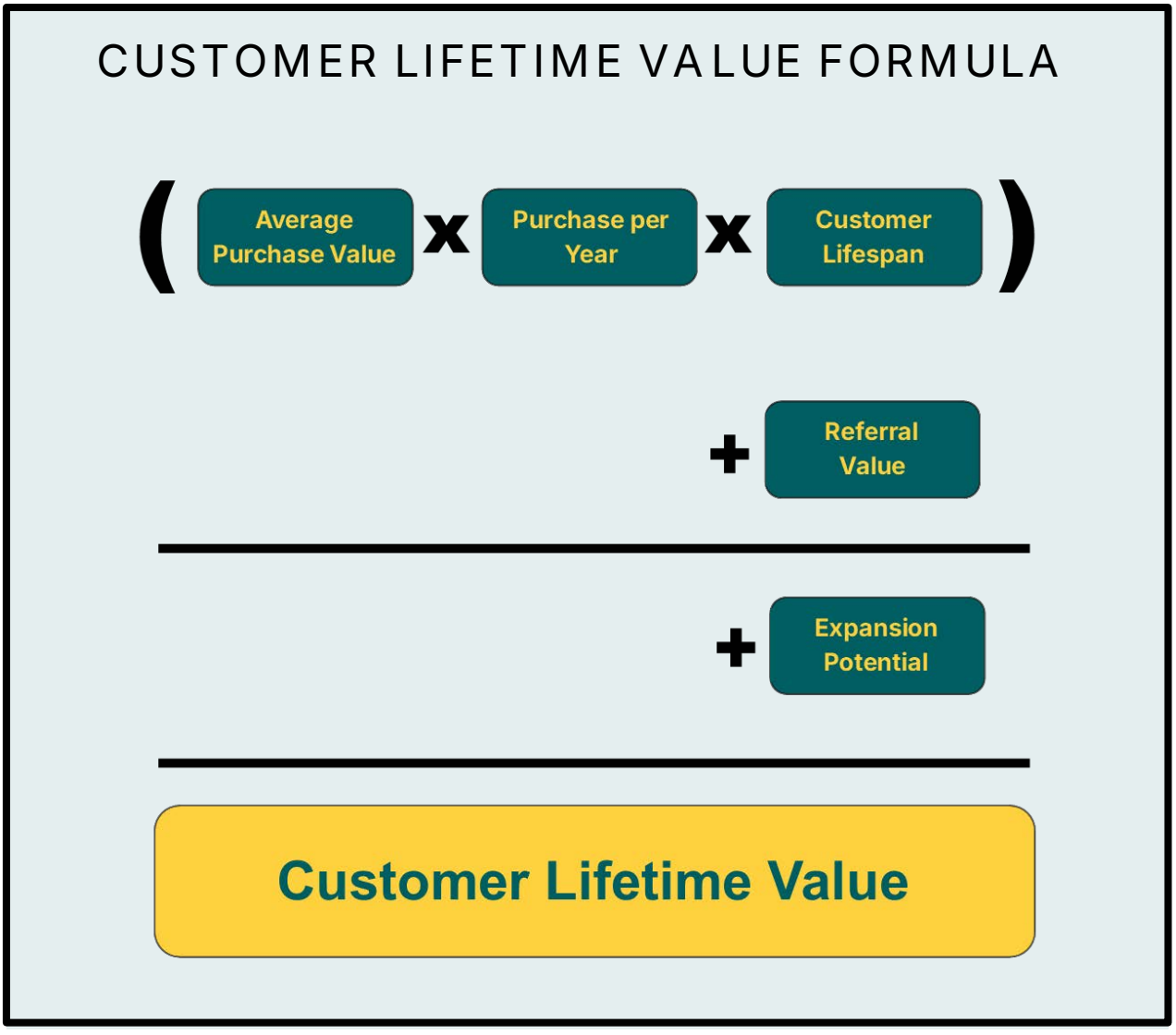
# CUSTOMER LIFETIME VALUE STRATEGY

When building your business, it is very important  be able to estimate that amount of revenue you expect to make so that you can weigh it against real time financial performance. This will allow to make future decisions that will accurately impact financial performance. To do this we must be able to calculate your ICP's lifetime value or what is know as the Customer Lifetime Value (CLV).

Customer Lifetime Value (CLV) is an estimate of the total revenue a business can reasonably expect from a customer over the entire business relationship. Knowing our CLV gives us the ability to make reasonable adjustments and decisions like how much to spend on marketing and how to adjust our product offers to gain more customers.

We will use the ICP to make educated, practical assumptions about customer behavior, then translate them into numbers.

We will us the ICP to gain insight by using the following formula:



The following chart explains each of the components of the formula:

| CLV Component | Questions | Purpose |
|---|---|---|
| Purchases per Year | On average, how many times per year does your ideal customer purchase products or services like yours? | Buying Frequency |
| Average Purchase Value | What is the average amount your ideal customer is willing to pay per purchase? | Price Tolerance |
| Customer Lifespan | On average, how many years does your ideal customer continue working with a provider like you? | Retention Potential |
| Referral Value | On average, how many referrals does one ideal customer generate over their lifetime? | Trust Level |
| Expansion Potential | What is the estimated additional revenue an ideal customer may generate as their needs grow? | Growth Stage |

Let's review in component in detail so that you can calculate your own Ideal customers life time value. In the following pages, we will review each component of the CLV using the chart above.

**Average Purchase Value**

# CALCULATING AVERAGE PURCHASE VALUE

## QUESTION:

On average, how many times per year does your ideal customer purchase products or services like yours?

## HOW TO FIND THE ANSWER:

### FACTORS THAT CONTRIBUTE TO AVERAGE PURCHASE VALUE

| | |
|---|---|
| **Perceived Value** | What your customer is willing to pay for the solution? |
| **Problem Severity** | How much does it cost the ideal customer if the problem remains unsolved. |
| **Cost of Inaction** | What does this problem currently cost my ideal customer in time, money, and missed opportunity? |
| **Survey** | What do your competitors charge to solve the same or similar problems? |

## PURPOSE OF THE ANSWER:

| | |
|---|---|
| **Price Tolerance** | The maximum amount of money that a customer is will to pay to solve a specific problem. |

*If the problem is costing the customer $50, 000 per year then paying $5,000 to fix it becomes more reasonable*

**Purchase per Year**

# CALCULATING PURCHASES PER YEAR

## QUESTION:

What is the average amount your ideal customer is willing to pay per purchase?

## HOW TO FIND THE ANSWER:

### FACTOR THAT CONTRIBUTE TO PURCHASE PER YEAR

| | |
|---|---|
| **Maintenance** | Will the solution require additional services to maintain quality? |
| **Add -Ons/ Upgrades** | Can the solution be enhanced or customized? |
| **Problem Structure** | Is this problem one-time, recurring, or evolving? |
| **Industry Norms** | Research the industry to discover standards and practices commonly used by companies like yours? |

## PURPOSE OF THE ANSWER:

| | |
|---|---|
| **Buying Frequency** | The number of times customers buy from you over the course of one year. |

*After the one time purchase of a car, the vehicle will typically need maintenance and repairs, which increase the purchase per year.*

**Customer Lifespan**

# CALCULATING CUSTOMER LIFESPAN

## QUESTION:

On average, how many years does your ideal customer continue working with a provider like you?

## HOW TO FIND THE ANSWER:

### FACTORS THAT CONTRIBUTE TO CUSTOMER LIFESPAN

| | |
|---|---|
| **Relationship Type** | Is the service you provide transactional, ongoing, or strategic? |
| **Business Lifecycle** | Is this business a Start -up (1-2 years), in the growth stage (2- 4 years), or Established (5+ Years) ? |
| **Industry Norms** | Research the industry to discover contract lengths and typical vendor relationships within the industry? |

## PURPOSE OF THE ANSWER:

| | |
|---|---|
| **Retention Potential** | Your ability to keep the same customer overtime |

*Customer lifespan is estimated by understanding how long your ideal customer typically experiences the problem you solve and how long they maintain relationships with providers like you.*

**Referral Value**

# CALCULATING REFFERAL VALUE

## QUESTION:

On average, how many referrals does one ideal customer generate over their lifetime?

## HOW TO FIND THE ANSWER:

### FACTORS THAT CONTRIBUTE TO CUSTOMER REFFERAL VALUE

| | |
|---|---|
| **Industry Trends** | How likely are customers within this industry to refer you to other businesses |
| **Survey** | What do companies in this industry do to build trust |

## PURPOSE OF THE ANSWER:

| | |
|---|---|
| **Trust Level** | Your ability to get the customer to see you as reliable, capable, and honest. |

*When customers refer others, their value expands beyond their own purchases which make referrals a point of interest for businesses to focus on.*

**Expansion Potential**

# CALCULATING EXPANSION POTENTIAL

## QUESTION:

What is the estimated additional revenue an ideal customer may generate as their needs grow?

## HOW TO FIND THE ANSWER:

### FACTORS THAT CONTRIBUTE TO EXPANSION POTENTIAL

| | |
|---|---|
| **Upsells** | How likely are customers within this industry to need more services as they scale their business? |
| **Advanced Services** | What specialized services will you customers need as they grow their business? |

## PURPOSE OF THE ANSWER:

| | |
|---|---|
| **Growth Stage** | The amount of sales and market share that a business is currently experiencing |

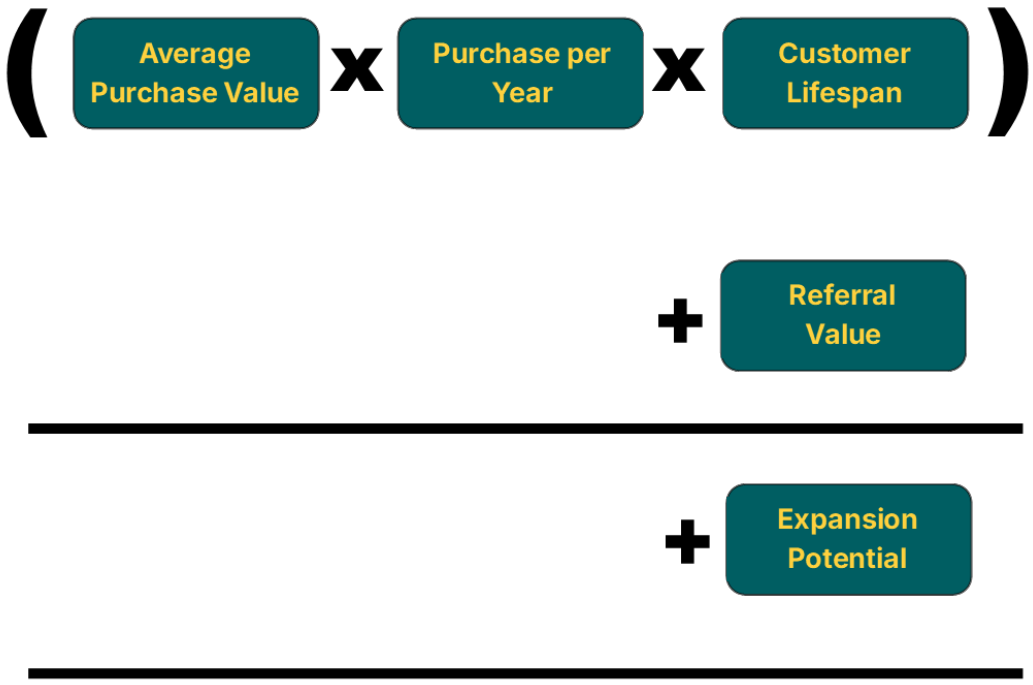
*They more sales and customers that a business has, the more likely they will need new and better solutions.*

# Customer Lifetime Value

## QUESTION:

How do we estimate the total revenue we can reasonably expect from a customer over the entire relationship?

## HOW TO FIND THE ANSWER:




## PURPOSE OF THE ANSWER:

Customer Lifetime Value is calculated by translating what you know about your ideal customer's buying habits, budget, and loyalty into measurable financial expectations.

These financial expectations can be used to calculate potential revenue and help leaders determine which costs are more important when it comes to its impact on revenue

**Example:**

# ABC WEB COMPANY, INC.

## CUSTOMER LIFETIME VALUE CALCULATION

| VARIABLE | SOURCE | VALUE |
|---|---|---|
| AVERAGE PURCHASE PRICE | Based on industry averages on current product offering:<br>– Year 1 - $8,000<br>– Year 2- $3,000<br>– Year 3 - $3,000 | $14,000 |
| PURCHASE PER YEAR | Based on Industry averages:<br>– Main website: 1<br>– Continue maintenance annually<br>– Request updates one annually | 3 |
| CUSTOMER LIFESPAN | Based on Average retention rates for web agencies:<br>3 - 5 Years | 4 |
| REFERRAL VALUE | Web agencies often get 1 referral per 3 clients with an average Close rate of 40%<br>So per client:<br>1 referral ÷ 3 = 0.33 referral<br>0.33 × 40% close rate = 0.132 new clients per year<br>0.132 × $32,004 = $4224.53 | $4,225 |
| EXPANSION POTENTIAL | Expansion services:<br>– Branding refresh ($2,000)<br>– E-commerce add-on ($4,000)<br>$2000 + $4000 = $6,000 | $6,000 |

CUSTOMER LIFETIME VALUE FORMULA

( Average Purchase Value x Purchase per Year x Customer Lifespan )

+ Referral Value

+ Expansion Potential

**Customer Lifetime Value**

ABC WEB COMPANY, INC.

CUSTOMER LIFETIME VALUE FORMULA

( $14,000 x 3 x 4 )

+ $ 4,225

+ $ 6,000

**$178,229**



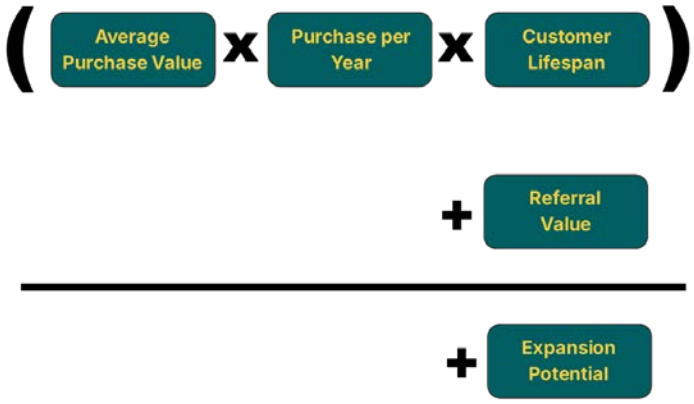
# YOUR TURN

Use the worksheets on the following page to calculate your own **Lifetime Customer Value**.

# CUSTOMER LIFETIME VALUE CALCULATION WORKSHEET

## Instructions

Use this worksheet to calculate your business Customer Lifetime Value .




| VARIABLE | VALUE |
|---|---|
| Average Purchase Price | |
| x Purchases Per Year | |
| x Customer Lifetime | |
| = Lifetime Revenue | |
| + Referral Value | |
| + Expansion Potential | |
| = Customer Lifetime Value | |

The next component of our finances we will be learning is Cost. Specifically, how to manage cost using Bookkeeping as a Strategy. Bookkeeping is the systematic tracking and categorization of where your money comes from and where it goes. When using bookkeeping to manage cost, the questions we must answer are:

- What are you spending money on?
- Is the expense necessary?
- Does the expense create value?

The goal of using bookkeeping to manage our costs by making expenses visible, comparable, and controllable so that we can make the necessary changes in operations or marketing if profits ever begin to decrease. By tracking, categorizing, and analyzing our expenses we can control spending, protect profit, and make informed growth decisions.

Typically, this is all managed by financial software like QuickBooks or Waves, however it is important to understand the basics of bookkeeping so that you can make informed decisions. The following are some important steps to take when using a bookkeeping strategy to manage you finances:

## STEP 1: CATEGORIZE EXPENSES BY FUNCTION

In this step, we will be we will categorize each expense based on the business function the expense supports. A business function is any activity that must occur for a business to survive. This means that instead of just listing each expense, we will place it in the appropriate category so that we can better understand the role this expense plays in our business. For the sake of simplicity, we will focus on the following:

| | |
|---|---|
| **Operation Costs** | Costs associated with creating and delivering value. |
| **Marketing Costs** | Costs associated with communicating and converting value into revenue. |
| **Administration Costs** | Costs associated with managing money, people, and strategy. |

It is important to note that there are many more business functions that a business may need based on the stage of growth they are currently experiencing. The three that we will be reviewing are the most common set of business function that every business needs whether it's a one-man army or a million-dollar conglomerate.

To properly categorize our costs, we will use a Chart of Accounts. A Chart of Accounts (COA) is an organized list of all the financial accounts a business uses to record, categorize, and track its financial transactions.

The following is a Chart of Accounts used as an example to manage costs:

### Operations Costs

- Contractor Fees
- Production Software
- Production Tools
- Materials
- Supplies
- Quality Control

### Marketing Costs

- Digital Advertising
- Print Advertising
- Website Hosting
- Email Marketing Software
- Content Creation
- CRM Software

### Administrative

- Bookkeeping Software
- Legal & Compliance
- Office Expenses
- Business Insurance
- Licenses & Subscriptions
- Bank Fees
- Professional Development

Use this example to build your own chart of accounts based on where you expect to spend money

## STEP 2: IDENTIFY COSTS THAT CREATE VALUE

Now that your Chart of Accounts contains all your expenses, we will now identify the expenses that support the value creating activities found in your value chain. To do this we must go through each item in our chart of accounts and ask, "What activity does this expense support?"

You can use the list you created in your value chain model to connect the expense to a value driven activity or output

**EXAMPLES**:

- Contractor Fees supports Service Delivery
- Website Hosting Fees supports Marketing
- CRM Software supports Sales

## STEP 3: TRACK FIXED VS VARIABLE COSTS

Finally, we will identify the fixed costs from the variable costs so that we understand the risks and rewards associated with business growth.

Fixed costs are expenses whose amounts stay the same each month. Examples of fixed costs are expenses like Rent or Hosting because these costs typically do not increase or decrease throughout the year.

Variable costs are expenses that typically increase as you grow are obtain more sales. Examples would be the amount you spend on sub-contractors, digital ads, or travel.

Identifying and tracking these costs makes it so that you can make decisions like what cost to cut if necessary or what your profit margins can will be if your grow your customer base.

The following chart combines these three steps so that you can see how the entire process at work using general examples from today's businesses.

| Business Function | Cost Category | How This Cost Produces Value | Cost Type |
|---|---|---|---|
| **Operations** | | | |
| | Contractor Fees | Service Delivery | Variable |
| | Production Software | Product Development | Fixed |
| | Production Tools | Product Development | Fixed |
| | Materials | Product Development | Variable |
| | Supplies | Supports day-to-day production activities | Variable |
| | Quality Control | Product Reliability and Improvement | Variable |
| **Marketing** | | | |
| | Digital Advertising | Generates Leads | Variable |
| | Print Advertising | Generates Leads | Variable |
| | Website | Customer Conversion platform | Fixed |
| | Email Marketing Software | Lead Conversion Tool | Fixed |
| | Content Creation | Lead Conversion Tool | Variable |
| | CRM Software | Manage Customer Relationships | Fixed |
| **Administrative** | | | |
| | Bookkeeping Software | Tracks financial activity to support informed decisions | Fixed |
| | Legal & Compliance | Protects the business and ensures regulatory adherence | Fixed |
| | Office Expenses | Supports the operational environment | Fixed |
| | Business Insurance | Mitigates financial and operational risk | Fixed |
| | Licenses & Subscriptions | Enables legal operation and access to essential tools | Fixed |
| | Bank Fees | Supports financial transactions and payments | Variable |
| | Professional Development | Improve skills and long-term business capability | Fixed |

# PROFIT

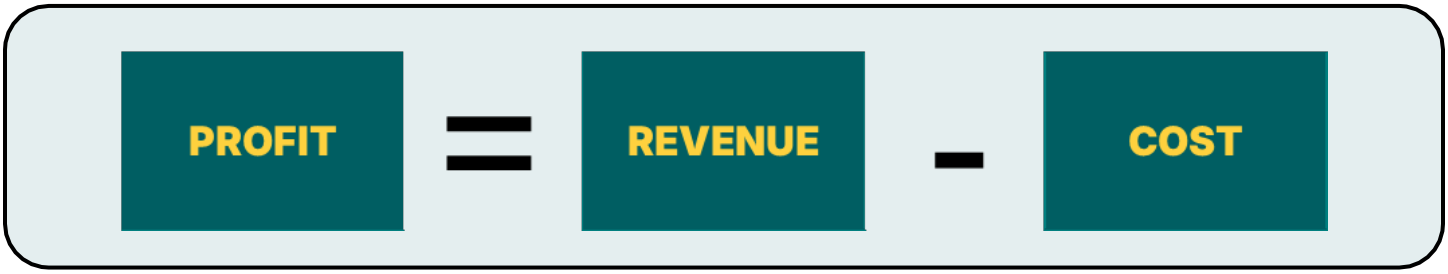
The final component in our finances is Profit. Profit is the financial value that remains after a business has generated revenue and paid all costs required to operate and sustain itself. Profit is important because it is the ultimate measurement of a business effectiveness, efficiency, and sustainability.

Profit is also important because it helps you answer 4 critical business questions:

- ☐ Is my business model viable?
- ☐ Is the value being delivered priced correctly?
- ☐ Are resources being used efficiently?
- ☐ Can I scale my business organically without interrupting current operations?

## How to Calculate Profit

The basic formula for profit is as follows:




This is the most basic way to assess profit; however, it is important to understand that the are 3 types of Profit:

- Gross Profit
- Operating Profit
- Net Profit

The following chart explains the relationship between the types of profit and what it means for your business.

| Type of Profit | Definition | What It Means to My Business |
|---|---|---|
| Gross Profit | Revenue minus the direct costs required to deliver a product or service. | It shows whether the core offering is priced correctly and can be delivered efficiently. If gross profit is weak, no amount of marketing or scaling will fix the business. |
| Operating Profit | Gross profit minus operating expenses such as marketing, sales, and administrative costs. | Reveals whether the business model works day-to-day. It reflects management efficiency and the sustainability of operations. |
| Net Profit | Operating profit minus all remaining expenses, including taxes, interest, and one-time costs. | Indicates the true financial success of the business. Net profit determines long-term survival, reinvestment potential, and owner compensation. |

It is important to understand the types of profit because many startups fail due to only focusing on revenue, ignoring gross margins, or underestimating their operating costs. When you understand the three types of profit, you have a full understanding of your business and prevent the mistake of negligence in your finances.

# PART - 3: MEASURES

**Therefore, by their fruits you will know them.**

**- Matthew 7:20**

# MEASURES

Now that we've assessed our business and created it's identity by building its core functions and structure, we now will create a system of accountability  to ensure excellent execution. To accomplish this, we will be identifying our businesses Key Performance Indicators (KPI).

A Key Performance Indicator (KPI) is a measurable value that shows how effectively a business is achieving its most important objectives.

KPIs translate goals into specific, traceable metrics so leaders can monitor performance, make decisions, and improve results over time.

## FOR EXAMPLE:

**Company**: ABC Web Company, Inc

**Objective**: Deliver high-quality websites while creating long-term client value

**Key Performance Indicators**

**Operations**

- **Project Delivery Time** – Measures how long it takes to complete a website from start to launch
- **Revision Rate** – Measures how often projects require rework after delivery

**Marketing**

- **Lead-to-Client Conversion Rate** – Tracks how effectively marketing turns interest into sales.
- **Cost per Client Acquisition** – Measures how much is spent to win each new client.
- **Client Retention Rate** – Indicates long-term relationship value and satisfaction.

**Finance**

- **Gross Profit Margin** – Shows whether projects are priced and delivered profitably.

With these KPIs ABC Web Company, Inc. will ensure that it can deliver high quality websites and create long term client value because they help leadership do the following:

- Identify workflow bottlenecks if delivery time increases
- Improve onboarding and scope clarity if revision rates rise
- Adjust marketing channels if cost per acquisition goes up
- Refine pricing or processes if profit margins shrink

## DEVELOPING YOUR OWN KPIs

To create your own KPI's you must ensure that they are SMART:

**S**pecific – clearly defined

**M**easurable – based on data, not opinion

**A**ctionable – something you can control or influence

**R**elevant – tied to a business goal

**T**ime-bound – tracked over a period

By ensuring that your KPIs are SMART, you show whether your business is making progress toward its most important goals. This allows you to manage your business in a way that creates visibility, meaning you always know what is happening in your business. You also create accountability because it highlights where the problem is and what must be addressed to reach the goal or objective.

Our goal in choosing KPI's is to answer the following questions:

- Are we delivering value efficiently?
- Are we attracting the right customers effectively?
- Is the business profitable and sustainable?

On the following page is a chart of generic KPIs that most small businesses use to manage business performance. It is important to note that every business is different so you may have specific goals that you want to keep track of for your own purposes.

## OPERATIONS KPIs

*Are we delivering value efficiently?*

| KPI | MEASURES | PURPOSE |
|---|---|---|
| Cycle Time | Time to complete a product or service | Faster delivery improves customer satisfaction |
| On-Time Delivery Rate | % of work delivered on schedule | Reliability builds trust |
| Cost per Service / Project | Cost to deliver each output | Protects margins |
| Quality Error Rate | Frequency of defects or rework | Reduces waste and dissatisfaction |
| Capacity Utilization | How much available time/resources are used | Prevents burnout or underuse |
| Customer Satisfaction Score | Client perception of delivery quality | Indicates value delivery |

## MARKETING KPIs

*Are we attracting  the right customers effectively?*

| KPI | MEASURES | PURPOSE |
|---|---|---|
| Leads Generated | Number of potential customers | Indicates demand creation |
| Cost per Lead (CPL) | Cost to acquire each lead | Controls acquisition spend |
| Conversion Rate | % of leads that take action | Shows message-market fit |
| Website Traffic | Number of visitors | Measures visibility |
| Engagement Rate | Interaction with content | Indicates relevance |
| Email Open / Click Rate | Audience interest | Shows trust and attention |

## FINANCIAL  KPIs

*Is the business profitable and sustainable?*

| KPI | MEASURES | PURPOSE |
|---|---|---|
| Revenue | Total income | Growth indicator |
| Gross Profit Margin | Revenue after delivery costs | Core business health |
| Operating Profit Margin | Profit after operating expenses | Sustainability |
| Net Profit Margin | Final profitability | Long-term viability |
| Cash Flow | Money in vs out | Survival metric |

Now that we've identified our KPIs, lets understand how to calculate each one so that we can determine the status of the business at any given period of time> The following chart shows the calculation for each KPI:

| KPI | HOW TO CALCULATE |
|---|---|
| **OPERATIONS** | |
| Cycle Time | Total time to complete all work ÷ Number of products/services delivered |
| On-Time Delivery Rate | (Projects delivered on time ÷ Total projects) × 100 |
| Cost per Service / Project | Total operations costs ÷ Total services/projects delivered |
| Quality Error Rate | (Number of reworks or defects ÷ Total deliveries) × 100 |
| Capacity Utilization | (Actual hours worked ÷ Available hours) × 100 |
| Customer Satisfaction Score | (Positive responses ÷ Total responses) × 100 |
| **MARKETING** | |
| Leads Generated | Count of new leads in a period |
| Cost per Lead (CPL) | Total marketing spend ÷ Total leads |
| Conversion Rate | (Customers ÷ Leads) × 100 |
| Website Traffic | Total visitors in a period |
| Engagement Rate | (Interactions ÷ Views) × 100 |
| Email Open / Click Rate | (Opens or clicks ÷ Emails sent) × 100 |
| **FINANCE** | |
| Revenue | Total sales in a period |
| Gross Profit Margin | ((Revenue – Cost of services) ÷ Revenue) × 100 |
| Operating Profit Margin | (Operating profit ÷ Revenue) × 100 |
| Net Profit Margin | (Net profit ÷ Revenue) × 100 |
| Cash Flow | Cash received – Cash paid |

# LEADERSHIP DASHBOARD

Once you have completed identifying all of your KPIs, it is now time to create your **Leadership Dashboard**. A leadership dashboard is a visual management tool that consolidates the most critical Key Performance Indicators (KPIs) across the business into one place so leaders can quickly assess performance, spot risks, and decide where to focus attention.

The benefit to having a leadership dashboard is that it helps leaders:

- Make faster decisions
- Focus attention where it matters most
- Prevent small problems from becoming big ones
- Align teams around the same priorities
- Replace gut decisions with data-backed ones

## Leadership Dashboard Typically Includes

1. **Goals and Objectives**

   States the outcomes the business must accomplish in a given period of time.

2. **Goal Aligned Metrics**

   The KPIs that directly support business goals and objectives, aligned across 4 perspectives:

   - **Financial** - The KPIs that support your financial perspectives
   - **Customer** - The KPIs that support initiatives that drive customer behavior and effect financial objectives.
   - **Internal** - The KPIs that track operational initiatives that will impact customer behavior.
   - **Learning & Growth** - The KPIs that track initiatives aimed at training and technologies that support and innovate internal processes

3. **Status Signals**

   Coded signal to show if a metric is on track, at risk, or off track

In the following pages, we will explain the individual parts of a leadership dashboard and use examples so that we have a real life explanation of how to use this business tool in your business.

## GOALS AND OBJECTIVES

Goals and objectives define what success looks like for the business within a specific period of time. They answer the question: "What must we accomplish to move the business forward?"

| | |
|---|---|
| **Goals** | high-level outcomes that state what the business needs to achieve. |
| **Objectives** | specific, measurable targets that make the goal actionable |

Goals and objectives define what the business must focus on, measure, and manage. Without clear goals and objectives, KPIs are useless and become a distraction rather than a tool used for guidance.

### FOR EXAMPLE:

**ABC Web Company, Inc – Year 1**

**Goal:** Grow ABC Web Company Inc. into a profitable Web Development Agency.

**Objectives**

- Increase monthly revenue to $20,000
- Maintain a gross profit margin of 60%
- Deliver 95% of projects on time
- Achieve a customer satisfaction score of 90%+

# GOAL-ALIGNED METRICS

Goal-aligned metrics are KPIs that directly measure progress toward your goals. Every KPI should answer the question: "If this number improves, does the business get closer to its goals?"

To ensure balance, KPIs are aligned across four perspectives to prevent over-optimizing one area like revenue at the expense of other KPIs like product quality or customer trust.

The following is an explanation of the four perspectives:

## FINANCIAL PERSPECTIVE

These KPIs measure whether the business is financially healthy and sustainable.

They answer the following questions:

- Are we making enough money?
- Are we profitable?
- Can we fund future growth?

**FOR EXAMPLE:**

**ABC Web Company – Year 1**

*Financial KPIs*

- **Monthly Revenue** - Revenue from sales each month
- **Gross Profit Margin** - Revenue - Costs

## CUSTOMER PERSPECTIVE

These KPIs measure customer behavior, perception, and satisfaction, which ultimately drive revenue and retention. When aligned properly, customer perspective KPIs act as an indicator of future financial performance.

They answer the questions:

- Are we attracting the right clients?
- Are clients satisfied with our work?
- Are they coming back or referring others?

FOR EXAMPLE:

**ABC Web Company – Year 1**

*Customer KPIs*

- **Conversion Rate** - leads that turn into clients
- **Customer Satisfaction Score** – Survey that measure how satisfied clients are with our products
- **Client Retention Rate** – Percentage of customers that buy more products with one year
- **Referral Rate** - Percentage of customers that lead other to buy from us.

## INTERNAL PERSPECTIVE

These KPIs track how well internal processes are performing.

They answer the following questions:

- Are we delivering efficiently?
- Are we consistent and reliable?
- Where are we wasting time or money?

Internal KPIs influence customer experience and profitability. They directly affect how customers feel about your products, which in turn effect profit margins.

FOR EXAMPLE:

**ABC Web Company – Year 1**

*Internal KPIs*

- **Cycle Time** - project duration
- **Cost per Project** - Expenses spent on each project
- **Quality Error Rate** - Number of revisions or rework

## LEARNING & GROWTH PERSPECTIVE

These KPIs measure the business's ability to improve, adapt, and scale over time.

They answer the question:

- Are we investing in skills and tools?
- Are we improving how work gets done?
- Are we innovating within the business?

The goal of this perspective is to manage long-term competitiveness. Learning & Growth KPIs fuel improvements in Internal processes, which improve Customer outcomes, which drive Financial results.

**FOR EXAMPLE:**

**ABC Web Company – Year 1**

*Learning & Growth KPIs*

- **Training Hours per Team Member**
- **Adoption of New Tools or Technologies**
- **Process Improvement Initiatives Completed**

## STATUS INDICATORS

Coded signals provide an at-a-glance status of each KPI, allowing leaders to quickly assess where attention is needed. Typically, a traffic-light system is used to alert the leader of the metrics status:

- **Off Track** – Missing targets that requires immediate action
- **At Risk** – Trending below target or showing warning signs
- **On Track** – Performing at or above target

Health signals transform raw data into decision making insight.

### FOR EXAMPLE:

**Goal:** Grow ABC Web Company Inc. into a profitable Web Development Agency.

**Objectives**

- Increase monthly revenue to $20,000
- Maintain a gross profit margin of 60%
- Deliver 95% of projects on time
- Achieve a customer satisfaction score of 90%

| KPI | Target | Current | Status |
|---|---|---|---|
| Monthly Revenue | $20,000 | $16,500 | At Risk |
| Gross Profit Margin | 60% | 63% | On Track |
| On-Time Delivery | 95% | 78% | Off Track |
| Customer Satisfaction | 90% | 91% | On Track |

On the following page is a sample of a completed leadership dashboard using our example business ABC Web Company, Inc.

FOR EXAMPLE:

# ABC WEB COMPANY, INC
# LEADERSHIP DASHBOARD

**Goal:** Grow ABC Web Company Inc. into a profitable Web Development Agency.

**Objectives**

- Increase monthly revenue to $20,000
- Maintain a gross profit margin of 60%
- Deliver 95% of projects on time
- Achieve a customer satisfaction score of 90%

| KPI | Target | Current | Status |
|---|---|---|---|
| **Monthly Revenue** | $20,000 | $16,500 | At Risk |
| **Gross Profit Margin** | 60% | 63% | On Track |
| **On-Time Delivery** | 95% | 78% | Off Track |
| **CSAT** | 90% | 91% | On Track |

### FINANCIAL PERSPECTIVE

| | |
|---|---|
| Monthly Revenue | $16.500 |
| Gross Profit Margin | $10,395 |

### CUSTOMER PERSPECTIVE

| | |
|---|---|
| Conversion Rate | 20% |
| Customer Satisfaction Score | 91% |
| Client Retention Rate | 80% |
| Referral Rate | 10% |

### INTERNAL PERSPECTIVE

| | |
|---|---|
| Cycle Time | 2 Weeks |
| Cost per Project | $1,000 |
| Quality Error Rate | 5% |

### LEARNING & GROWTH PERSPECTIVE

| | |
|---|---|
| Training per Team Member | 1 |
| New Tools & Technologies | 2 |
| Process Improvement Initiatives | 0 |



# YOUR TURN

Use the worksheets on the following page to create your own **Leadership Dashboard**.

# LEADERSHIP DASHBOARD TEMPLATE

**Goal:**

**Objectives:**

| KPI | Target | Current | Status |
|---|---|---|---|
| | | | |
| | | | |

### FINANCIAL PERSPECTIVE

| | |
|---|---|
| | |
| | |

### CUSTOMER PERSPECTIVE

| | |
|---|---|
| | |
| | |

### INTERNAL PERSPECTIVE

| | |
|---|---|
| | |
| | |

### LEARNING & GROWTH PERSPECTIVE

| | |
|---|---|
| | |
| | |


CONGRATULATIONS

# CONCLUSION

## YOU DID IT!

If you're reading this, then you do what others won't, **Plan Properly to Execute Excellently!** With this framework and the worksheets you've:

- Assessed your business capabilities and establish a path for growth
- Created the identity of your business by establishing your operations, marketing and finances.
- Established a system of accountability so that you create a culture of execution.

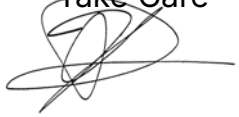
The A.I.M Framework provides you with a clear and practical way to understand how your business creates value and converts effort into results. By breaking the business down into its most critical components, The A.I.M frame work has helped you:

- Clarify operations by identifying your value chain model
- Establish customer relationships through marketing
- Connect daily work to measurable financial results.
- We used the tools in the A.I.M Framework to give you a Strategy for success by:
- Establishing the importance of understanding ideal customers
- Aligning outputs with real customer needs
- Using outcomes to guide financial decisions making
- Identifying business tools to enhance performance tracking
- Creating a culture focused on strategic growth.

Ultimately, The A.I.M Framework is designed to help us use our purpose to serve our neighbor. When applied consistently, the A.I.M Framework creates alignment between your God-given Purpose and Proper Execution of your purpose in the marketplace. I pray this gives your business a strong foundation for sustainable growth.

May God bless you on your business journey and I pray you achieve fulfillment as you live in what God has created you for.

Take Care



Harold Dangervil



# YOUR TURN

Use what you've learned to:

## BUILD YOUR BUSINESS

## LIVE YOUR PURPOSE

## LOVE YOUR NEIGHBOR

# CREDITS ACKNOWLEDGMENTS

This workbook is built on a foundation of practical business strategy, financial principles, and real world application. The concepts presented are designed to help entrepreneurs move from ideas to execution.

## CREATOR BACKGROUND

Developed by Harold Dangervil, founder of **Excellence & Execution**, this workbook reflects a commitment to helping both entrepreneurs and purpose driven individuals to:

- **Build Sustainable Businesses**
- **Think Strategically**
- **Act Intentionally**
- **Love Their Neighbor Through Their Purpose**

Through a focus on clarity, structure, and execution, this work is designed to bridge the gap between knowledge and action so that anyone who reads it will have the tool to fulfill their purpose in the marketplace.

## CONTRIBUTIONS

**Photography**

www.babsphotographyllc.com

**Images**

www.freepik.com

**Graphic Design**

www.delmadethis.com

# WANT HELP TURNING THIS INTO ACTION?

**If you completed the exercises but still have questions...**

**Let's walk through them together.**

---

**In a 30-minute Business Clarity Call, we will:**

- **Identify your biggest current challenge**
- **Review your goals and positioning**
- **Clarify your next action steps**

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**THE GOAL IS TO ACHIEVE STRATEGIC CLARITY**

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