



The illustration features a stylized figure of a person standing atop a bar chart. The chart has three bars of increasing height, colored blue, red, and blue. A large, thick, yellow arrow points upwards from the right side of the chart. The background is a purple gradient with faint, circular patterns and a grid of small white squares. On the left and right sides, there are vertical stacks of white upward-pointing chevrons. The overall theme is business growth and scaling.

SCALE YOUR BUSINESS

WORKBOOK

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SCALE YOUR BUSINESS WORKBOOK

Use this workbook to assist you in scaling your business to the next level.

Step 1 Business Processes & Systems

Assess your current business processes and systems.

Use this list as your guide to truly up-level your business.

- Master Business Manual (MBM)
- Formal Business Plan
- Mission Statement
- Content and Graphic Style Guides
- Bookkeeping
- Branding Information
- Guide Sheets or Specs
- File List for Important Files
- Emergency Plan (in case something happened to you)
- Other

List the procedures that need to be created.

Step 2 Central Password Manager

If you don't have a central password manager, RoboForm or LastPass, research to find one that suits your needs.

Step 3 Workflows

List workflows you want to create for your business.

Decide on the method or software you will use to create flow charts.

- Create flowchart templates yourself
- Collaborate with a SaaS
- Text-based flowcharts
- Visual flowcharts
- Purchase templates

List the workflow charts you will create and share with your team.

Step 4 Tools and Apps

Assess your SaaS tools and apps.

Ask yourself the following questions for each one.

Will it grow with my business?

Does it integrate well with other software or systems I use/will need to use?

Am I duplicating functions with any app or SaaS?

Is it easy to use, or am I continue having problems with it?

Is it sophisticated enough for my upscaled business needs?

Is there a better app or SaaS I could use?

Place your notes below:

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Create a list of new systems or apps you want to use

Upscaling to:	Replaces:

Step 5 Content Creation System

Assess your content creation system.

Who creates the content for your business? Is it your best choice?

What is working? What is not?

Are you likely to change this in the future? How?

Draft your new plan (if you're changing it from your current plan) and how you will do it.

Step 6 Editorial Calendar

Install or purchase an editorial calendar. Begin planning your content creation and distribution if you don't have one in place or need to upgrade.

Research and find your ideal editorial calendar.

Step 7 Templates

Assess the templates you currently use for your business.

Do they do the best job for your business?

Do you need to purchase or create more?

Would that help you streamline and scale your business more effectively?

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Decide what you need to about your template strategy and needs.

Step 8 Work vs. Personal Time

Assess whether or not you need to adjust your ratio of work versus personal time.

What will you do for personal growth?

What do you like to do that you aren't doing?

Determine when and how you will take action to add the activities you're missing.

Step 9 Outsourcing

List what you currently outsource.

List tasks and processes you want to outsource.

List tasks or processes you will need to outsource in the future.

Step 10 Process Review

Review your work in Step 9.

Are there any processes or tasks that overlap?

Do they require more than one person to execute?

Pay attention to any patterns or repetitions (for example, three business admin tasks or four areas involving video). This is a big flag that you may need to outsource those areas or that you need to consider outsourcing in the future.

Step 11 Outsourcing Budget

Create and review your outsourcing budget.

What is your outsourcing budget?

Do you spend more on outsourcing than your budget allows?

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Do you spend less than your outsourcing budget allows?

Step 12 Monthly Expenses

Review your recurring monthly expenses.

Identify and cancel subscriptions or groups you are paying for but don't use.

Subscription:	Amount saving:

After canceling them, how much will you save each month to use toward your outsourcing budget?

Step 13 Where Do Fit In?

Determine where you fit in, within your niche and sub-niche.

Which experts do you see yourself comfortable working beside?

Pay attention to your physical reaction when looking at their sales pages.

Be inspired by them and figure out what you can do to up-level your pages.

Step 14 Getting Comfortable with the Competition

I see myself competing or joint venturing with:

I would not feel comfortable emulating who and why:

Determine if your reaction are fears that can be overcome by pushing past your comfort zone.

Step 15 Advertising

Do you currently use advertising in your current strategy? If not, when will you add it?

Current advertising budget:

The budget I want to have:

Step 16 Additional Income Sources

(We will use a coaching business for this example to generate more income.)

- A Specific one-time session as a bonus of membership signs up.
- A one-time session as a bonus for members joining only during a webinar.
- Limited session package as perks for members.
- Weekly 1-email per month support, where members can email with questions.
- Weekly or monthly live Q&A group webinar.
- Weekly or monthly Case Study with questions answered at the end.

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What can you do to bring additional income:

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Step 17 Live Interaction

Your audience crave your interaction. So, give them what they want!

Think about doing:

- Webinars
- Facebook Livestreams
- Teleseminars
- YouTube Livestreams

Step 18 Review Your Offerings

Review your current offerings. Look at your tracking stat results.

Document them and note how they are performing for you.

Product Name	Making Money?	Losing Money?	Dead in the Water

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Determine if you should revamp them, repurpose them, or eliminate them.

Product Name	Update?	Repurpose?	Monthly Profit/Loss