MY BUSINESS
WHAT I KNOW, WHERE I'M GOING, AND HOW I'M GETTING THERE

I Will Be Frank With You

Built over 6 weeks. Owned forever.

HOW TO USE THIS

Everything in here came from work you already did. Your job is not to start from scratch. Your job is to take the best of what is on your boards, in your tools, and in your head after five sessions of hard thinking and put it in one place.

This workbook is where you do the deep thinking. When you are done with all six sections you will transfer the most important outputs into your 90-Day Operating Plan. That is the document you bring to Session 6 and use for the next 90 days.

Work through this honestly. The quality of what goes into the operating plan depends entirely on the quality of what you put here.

SECTION 1: WHO I AM AND WHY I'M DOING THIS

Source: Session 1 board work. Your Why statement, Diamond Map, and DISC debrief.

THE BUSINESS IN ONE SENTENCE

What does this business do, for whom, and why does it matter. Not a tagline. The real answer.

Why this business exists

If this business disappeared tomorrow, who would actually miss it and why. Answer it honestly.

What kind of business I'm building

Circle one and write a sentence about why that's true.

Lifestyle business. Growth rocket. Legacy brand.

Where I am right now

Pull your Diamond Map scores from Session 1. Write your today score for each area and the single most important thing you said about why it's there.

Business: _____ / 10 What's driving this score:

Financial Independence: _____ / 10 What's driving this score:

Family and Relationships: _____ / 10 What's driving this score:

Health and Personal Energy: _____ / 10 What's driving this score:

How I operate under pressure

Pull from your DISC debrief. Two or three sentences about how your behavioral style shows up in the business, what it helps you do well, and what it costs you when you're not paying attention to it.

My three-year picture

One sentence minimum. What does the business look like and what does your life look like if this is working the way you intended.

SECTION 2: THE BUSINESS MODEL

Source: Business Model Tool and Sessions 2 and 3 board work. Direct translation with refinement where numbers have been verified.

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What I sell and who buys it

Describe your product or service offering and your target customer in plain language. Not a list. A description that connects what you sell to who needs it and why they choose you.

My ideal customer

Pull from Session 4. One paragraph. Real person, real situation, real reason they buy. Include who you've decided to stop serving and why.

How my business makes money

Source: Business Model Tool and Sessions 2 and 3 board work. Direct translation with refinement where numbers have been verified.

Every business generates revenue differently. Fill in the table below for each product, service, revenue stream, or income type your business has. Use the Revenue Type column to describe how the money actually comes in. Examples: hourly service, project fee, product sale, monthly retainer, commission, space rental, subscription, licensing, or any combination.

Revenue Stream Or Product	**Revenue Type**	**Price**	**Volume per Month**	**Hours to Deliver** (if applicable)	**Monthly Revenue**

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TOTALS				

What it costs to run this business

Pull from Session 2. Best verified numbers.

- Fixed costs per month: $
- Variable costs per month (approximate): $
- What I pay myself per month: $

How much do you need to run your business monthly:

- Monthly burn rate total: $

Do I have enough in the bank to cover my monthly burn rate:

- Months of runway at current revenue:

What makes this business different

Not what you wish were true. What a customer would actually say if you asked them why they chose you over someone else.

The compliance commitments I made

List what you flagged in Session 2 and confirm the calendar reminders are set.

What needs to stay compliant	Renewal or filing date	Reminder set?

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SECTION 3: THE NUMBERS I WATCH

Source: Dashboard tool and Sessions 3 and 5 board work.

Your dashboard is not separate from your 90-day plan. Every metric you track should connect directly to what you are working on and what you are trying to move. If a number on your dashboard has nothing to do with your goals for the next 90 days, it either should not be there or your plan needs to account for it.

The thinking you do here feeds directly into your 90-Day Operating Plan. Use this section to work through your focus and get clear on what you are trying to move. The operating plan is where you commit to it and track it.

My 90-Day Focus

Look back at Section 2. Look at your revenue model, your monthly burn rate, and your runway.

Then answer this question: is the business healthy enough at its current scale to focus on new growth opportunities, or does it need to fix how it runs before it adds more? If it's healthy for a new growth opportunity, write what that is below and move onto "My Goal For The Next 90 Days".

If it's not, look back at your revenue streams and burn rate line items. Pick the ones that are holding you and the business back. Knowing that will help you understand if you're focusing on Bottom or Top Line growth for the next 90 days.

Once you have them picked move onto the below list to narrow your focus.

BOTTOM LINE
The primary challenge is cost, margin, or how the business operates internally. Pick one or write one below.

- Operating costs too high
- Pricing too low for what I deliver
- Process inefficiency burning time and money
- Labor costs out of alignment
- Time going to the wrong activities
- Revenue mix is wrong, some streams cost more than they return
- Write in:

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TOP LINE

The primary challenge is revenue, reach, or demand. Pick one or write one below.

- Not enough leads or traffic coming in
- Traffic exists but is not converting
- Customers buy once and do not return
- Revenue streams are the wrong size or number
- The right customers are not finding me
- A new revenue stream needs to be built or validated
- Write in:

Why is the item or items the right focus for the next 90 days?

My Goal for the Next 90 Days

Write one to three specific, measurable goals. These are the outcomes you are committing to. Plain language. Specific enough that at 90 days you will know without debate whether you got there.

Examples: Increase monthly revenue by $2,000. Reduce the hours I spend doing work that does not belong in my role by 20 hours a week. Launch one new revenue stream that generates its first dollar within 60 days. Add three new clients at my target rate.

Goal 1:

Goal 2:

Goal 3:

Measuring My Next 90 Days

Use this table to sketch the metrics that matter most for your focus. This is a working draft. After completing Section 4 add your marketing and channel metrics. When this workbook is complete you will transfer your finalized metrics into the 90-Day Operating Plan.

Metric	What It Tells Me	How Often	Where I Get It

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What a good week looks like

Based on the above, describe in two or three sentences what a week looks like where the business is healthy and you're doing the work.

What a bad week looks like

Describe what the numbers tell you when something is off and what you do first when that happens.

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SECTION 4: MY CUSTOMER AND HOW I REACH THEM

Source: Session 4 journey map and Session 5 channel strategy. Refinement required to connect them.

The customer journey

Summarize the path your customer takes from not knowing you exist to becoming a loyal repeat buyer. Pull from the journey map board work. Write it as a narrative, not a list. Where does it work well. Where does it still break down.

The three friction points I'm fixing

Pull your Easy, Medium, Hard priorities from Session 4.

Easy fix: What it costs: Time / Money / People Status going into Session 6:

Medium lift: What it costs: Time / Money / People Status going into Session 6:

Harder problem: What it costs: Time / Money / People Status going into Session 6:

My committed marketing channels

Pull directly from your Channel Strategy Tool. Summarize each channel in one row.

Channel	Funnel Stage	Strategy in One Sentence	How Often

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My referral plan

Pull from Your Marketing Reality board work. Who you ask, when you ask, how you ask.

Who: When: How: What you offer in return if anything:

SECTION 5: THE CONSTRAINTS I STARTED WITH

Source: Session 1 homework. Reflection required.

The three things I said were holding me back

Write them exactly as you wrote them after Session 1.

1.
2.
3.

Where they stand now

For each one: is it still true, has it changed, or has the work we did over five sessions already started to address it?

1.
2.
3.

SECTION 6: WHERE I'M GOING AND HOW I'M GETTING THERE

Source: Sessions 5 and 6 board work and homework. This section is the foundation for your 90-Day Operating Plan.

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Your 90-day projects and first 7 days feed directly into your 90-Day Operating Plan. If you are doing something here that has no corresponding goal or KPI, either add the metric or question whether the activity belongs in the plan.

My three-year vision

What does the business look like in three years if everything goes the way you intend. One paragraph. Specific enough that you'd know if you got there.

My 12-month goals

What has to be true at the end of the next 12 months for you to be on track toward that vision. Three to five goals maximum. Specific and measurable.

1.
2.
3.
4.
5.

My 90-day projects

What are the three to five things you're going to complete in the next 90 days that move you toward your 12-month goals. These are projects, not tasks. Each one should have a clear outcome.

1.
2.
3.
4.
5.

My first 7 days

What are you doing this week. Not strategy. Actions. Specific enough that at the end of the week you either did them or you didn't.

1.

2.
3.
4.
5.

The honest question

Look at everything you just wrote. Do you have what you need to execute this on your own for the next 90 days? Or are there gaps in clarity, skill, accountability, or support that would make the difference between this working and this sitting in a folder somewhere?

Write your honest answer here. This is the conversation we have at the end of Session 6. It also informs the commitment you make at the bottom of your 90-Day Operating Plan.

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