[B&L] Prepare to Plan
Your Business is Telling You a Story. Listen!

Story Bistro
Question!

Where are you in your business right now?  
(How do you know?)
I don't worry about what could go wrong, she said.

I worry about whether I'm in a place yet where I could handle it if everything goes right.
Does this tell you a story?
Before You Choose a Path...

Know Where You Stand!
What You Need to Know

- Revenue by Type per Month
- Email Subscribers by Month
- Web traffic by Month
- Sources of Clients
Understanding Revenue

- When did each sale happen?
- What was purchased?
- For how much?
- What was the profit margin?
Understanding Your List

- Is your list growing?
- Staying the same?
- How many people open/read?
Understand Your Web Traffic

- How many visitors do you get?
- How long do they stay?
- Where are they coming from?
- What devices do they prefer to use?
Understand the Source(s) of Clients

Where does each new client come from?
But I Haven’t Tracked This Stuff!

Time to play detective
Start With Your Bank

- How/where are you getting paid?
- How/where do you create invoices?
# 2014 Revenue Recap

<table>
<thead>
<tr>
<th>Product/Service</th>
<th>Total Gross Revenue</th>
<th>Units Sold</th>
<th>Unit Price</th>
<th>Profit Margin</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>April</th>
<th>May</th>
<th>June</th>
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<th>Aug</th>
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<th>Oct</th>
<th>Nov</th>
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## Sales by Month

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<th>Jan</th>
<th>Feb</th>
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<th>April</th>
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Break Out the Spreadsheets!
Check Your eMail Provider

- How many subscribers did you have each month?
- What did they like? What did they ignore?
## Average Numbers by Month

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<tr>
<th>List</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
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Check Your Site Analytics

- Google Analytics or other service
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<th>Total Sessions</th>
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Where do Clients come from?

- Referrals?
- Social Media?
- Your List?
- Repeat Clients?
- What are the patterns?
Time to Ask Questions

- What am I doing right? What can I celebrate?
- What’s my best sources of new clients?
- What products or services are most popular?
- What products/services bring most net revenue?
- Is my business growing?
- What systems do I need to put in place?
- What needs cleaning up?
- What needs my attention and focus?
- How do I want to prioritize these?
And MORE Questions!

- What am I loving?
- What would I like to stop doing?
- How can I take better care of myself?
- What do I want for myself next year?
- What do I want for my business?
- What’s causing me the most trouble? (And what are my beliefs about it?)
- How can I be of greater service?
Where do you want to go?
Mark Your Calendar:

**November 14 & 15**

10:00 a.m. to 2:30 p.m., Friday
10:30 a.m. to 3:00 p.m., Saturday
Your Assignment

1. Complete the Pre-planning Inventory
2. Use the spreadsheet and customize for your business
3. Identify 2-3 Key Stories
4. Send the spreadsheet to me via email
5. Post your 2-3 learnings/stories in the forum.
The Prize

1. Post your answers to the forum no later than NOON Monday, October 20th
2. Entered to win 30 min 1:1
For More...

DigitalDiningRoom.com