Align Resources to Create an Action Plan

Using the self-assessment scores in the Business Performance Plan, select 3-5 areas to address and corresponding *Initiate* resources to get them started.

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| --- |
| MONEY |
| Creating a Profit & Loss (Income Statement) and Balance Sheet *Resource:*   * [Bookkeeping Reporting Basics](https://www.initiateprosperity.org/money/accounting-basics/bookkeeping-reporting-basics) * [Chart of Accounts: Organizing Your Books](https://www.initiateprosperity.org/money/accounting-basics/chart-of-accounts-organizing-your-books) * [Income Statement](https://www.initiateprosperity.org/money/financial-management/income-statement)   *Comments:* |
| Creating a Balance Sheet  *Resource:*   * [Bookkeeping Reporting Basics](https://www.initiateprosperity.org/money/accounting-basics/bookkeeping-reporting-basics) * [Chart of Accounts: Organizing Your Books](https://www.initiateprosperity.org/money/accounting-basics/chart-of-accounts-organizing-your-books) * [Balance Sheet](https://www.initiateprosperity.org/money/financial-management/balance-sheet-template)   *Comments:* |
| Using financial statements to make business decisions *Resources:*   * [Financial Management](https://www.initiateprosperity.org/money/financial-management/financial-management) * [Making Sense of Your Financial Statements](https://www.initiateprosperity.org/money/financial-management/making-sense-of-your-financial-statements)   *Comments:* |
| Create and using cash flow projections *Resources:*   * [Value of a Cash Flow Budget](https://yourorganization.initiateprosperity.org/money/cash-flow/value-of-a-cash-flow-budget) * [Planning for Cash Flow](https://yourorganization.initiateprosperity.org/money/cash-flow/planning-for-cash-flow) * Cash Flow Tool (For inventory based businesses) * [Cash Flow for Seasonal Business](https://www.initiateprosperity.org/money/cash-flow/cash-flow-for-seasonal-businesses) * [Cash Flow Budgeting Template](https://yourorganization.initiateprosperity.org/money/cash-flow/cash-flow-template)   *Comments:* |
| Reading and improving my credit score  *Resources:*   * [Basics of Credit Reporting](https://313strong.initiateprosperity.org/money/personal-credit/credit-reporting-guide) * [Credit Reporting](https://313strong.initiateprosperity.org/money/personal-credit/credit-reporting) * Components of Your Credit Score   *Comments:* |
| Understanding and implementing good bookkeeping practices  *Resources:*   * [Accounting Definitions](https://yourorganization.initiateprosperity.org/money/accounting-basics/accounting-definitions) * [Bookkeeping Reporting Basics](https://yourorganization.initiateprosperity.org/money/accounting-basics/bookkeeping-reporting-basics) * [Good Bookkeeping Habits](https://yourorganization.initiateprosperity.org/money/accounting-basics/good-bookkeeping-habits) * [Chart of Accounts: Organizing Your Books](https://yourorganization.initiateprosperity.org/money/accounting-basics/chart-of-accounts-organizing-your-books)   *Comments:* |
| Calculating break-even and profit needed to reach goals: *Resources*:   * [Break-Even & Target Profit Calculator](https://www.initiateprosperity.org/money/profitability/break-even-target-profit) * [Break-Even & Target Profit Template](https://www.initiateprosperity.org/money/profitability/break-even-target-point) * [Sales Planner for Manufacturers & Retailers](https://yourorganization.initiateprosperity.org/money/profitability/sales-planner-for-manufacturers) * [Sales Planner Calculator for Service Businesses](https://yourorganization.initiateprosperity.org/money/profitability/sales-planner-for-service-businesses)   *Comments:* |
| Understand and stay current all of my business tax obligations (i.e., sales, payroll, income, etc.) *Resources*:   * [Tax Planning & Reporting](https://www.initiateprosperity.org/money/taxes/tax-planning-reporting) * [IRS Resources for Small Businesses](https://www.initiateprosperity.org/money/taxes/irs-resources-for-small-businesses) * [Record Keeping Guide](https://www.initiateprosperity.org/money/taxes/record-keeping-guide) * [Record Keeping](https://www.initiateprosperity.org/money/taxes/record-keeping)   *Comments:* |
| **MARKETING** |
| Defining and reaching target market  *Resources*:   * [Finding Customers](https://www.initiateprosperity.org/marketing/marketing-basics/finding-customers) * [How to Create Target Personas](https://yourorganization.initiateprosperity.org/marketing/branding/how-to-create-target-personas) * [Marketing Situational Analysis](https://yourorganization.initiateprosperity.org/marketing/marketing-basics/marketing-situational-analysis)   *Comments:* |
| Communicating product/service features and benefits effectively  *Resource*:   * [Marketing Situational Analysis](https://www.initiateprosperity.org/marketing/marketing-basics/marketing-situational-analysis)   *Comments:* |
| Communicating my competitive advantage *Resource*:   * [Marketing Situational Analysis](https://www.initiateprosperity.org/marketing/marketing-basics/marketing-situational-analysis)   *Comments:* |
| Aligning my marketing plan to support my revenue and profit goals *Resources*:   * [Marketing Strategies & Budget Framework](https://www.initiateprosperity.org/marketing/marketing-basics/marketing-plan-template) * [Marketing Strategies and Tactics](https://313strong.initiateprosperity.org/marketing/marketing-basics/marketing-strategies-and-tactics) * [Marketing Channels](https://313strong.initiateprosperity.org/marketing/marketing-basics/marketing-tactics) * [What is Marketing Success?](https://313strong.initiateprosperity.org/marketing/marketing-basics/what-is-marketing-success-video)   *Comments:* |
| Creating /utilizing a brand that represents my business clearly *Resources:*   * [Introduction to Branding](https://313strong.initiateprosperity.org/marketing/branding/branding) * [Brand Audit Guide](https://313strong.initiateprosperity.org/marketing/branding/brand-audit-guide) * [Analyzing Your Brand](https://313strong.initiateprosperity.org/marketing/branding/brand-audit-questions) * [Creating Brand Consistency](https://313strong.initiateprosperity.org/marketing/branding/creating-brand-consistency)   *Comments:* |
| Increasing the effectiveness of my website *Resources*:   * [Determining the Goals of Your Website](https://initiateprosperity.org/marketing/website/website-goals) * [Five Things Every Business Website Must Include](https://313strong.initiateprosperity.org/marketing/website/website-layout) * [Beginners Guide to Showing up on Google](https://313strong.initiateprosperity.org/marketing/website/beginners-guide-showing-up-on-google) * [Producing Quality Website Content](https://313strong.initiateprosperity.org/marketing/website/producing-quality-website-content)   *Comments:* |
| Improving my social media marketing efforts  *Resources*:   * [Choosing a Social Media Platform](https://initiateprosperity.org/marketing/social-media/choosing-a-social-media-platform) * [Establish Your Online Presence with Local Listings](https://initiateprosperity.org/marketing/social-media/establish-your-online-presence-with-local-listings) * [Managing my Business Presence on Facebook](https://313strong.initiateprosperity.org/marketing/social-media/managing-my-business-presence-on-facebook) * [Google My Business](https://313strong.initiateprosperity.org/marketing/social-media/google-my-business-101)   *Comments:* |
| Engaging customers through email marketing  *Resources*:   * [Types of Successful Emails](https://www.initiateprosperity.org/marketing/email-marketing/types-of-successful-emails) * [Email Marketing Strategy Basics](https://313strong.initiateprosperity.org/marketing/email-marketing/email-marketing-strategy-basics) * [How to Send Great Marketing Emails](https://313strong.initiateprosperity.org/marketing/email-marketing/sending-great-marketing-emails) * [Checklist for Your First Email Campaign](https://313strong.initiateprosperity.org/marketing/email-marketing/checklist-for-your-first-email-campaign)   *Comments:* |
| Using and understanding digital advertising  *Resources*:   * [Search Engine Marketing](https://313strong.initiateprosperity.org/marketing/digital-advertising/search-ads-checklist) * [Display Advertising](https://313strong.initiateprosperity.org/marketing/digital-advertising/hypertargeting-using-display-ads) * [Facebook Ads](https://313strong.initiateprosperity.org/marketing/digital-advertising/facebook-overview)   *Comments:* |
| Creating effective content for my marketing efforts *Resources*:   * [Determining the Goals of Your Website](https://initiateprosperity.org/marketing/website/website-goals) * [Choosing a Social Media Platform](https://initiateprosperity.org/marketing/social-media/choosing-a-social-media-platform) * [Establish Your Online Presence with Local Listings](https://initiateprosperity.org/marketing/social-media/establish-your-online-presence-with-local-listings) * [Types of Successful Emails](https://www.initiateprosperity.org/marketing/email-marketing/types-of-successful-emails) * [Producing Quality Website Content](https://313strong.initiateprosperity.org/marketing/website/producing-quality-website-content)   *Comments:* |
| **MANAGEMENT** |
| Utilizing time management strategies *Resources*:   * [Time Management](https://www.initiateprosperity.org/management/business-management/time-management) * [Goals and Time Management Plan](https://www.initiateprosperity.org/management/business-management/goals-and-time-management-plan)   *Comments:* |
| Developing a plan to address risks (human, structural, technology, and cash management) *Resources*:   * [Business Insurance 101](https://313strong.initiateprosperity.org/management/risk-management/business-insurance-101) * [Risk Management](https://313strong.initiateprosperity.org/management/risk-management/risk-management) * [Evaluating Risk: What to Look For](https://313strong.initiateprosperity.org/management/risk-management/evaluating-your-risk-what-to-look-for)   *Comments:* |
| Protecting your business and customer data  *Resources:*   * [What to Know About Cybersecurity](https://313strong.initiateprosperity.org/management/cybersecurity/what-to-know-cyber-security) * [Determining Your Level of Cyber Risk](https://313strong.initiateprosperity.org/management/cybersecurity/determining-your-level-of-cyber-risk)   *Comments:* |
| Working on strategy and vision  *Resources*:   * [Defining Your Mission, Vision, and Core Values](https://313strong.initiateprosperity.org/management/business-management/defining-your-mission-vision-and-core-values) * [What is a SWOT and How Can It Help Your Business?](https://www.initiateprosperity.org/management/business-management/swot-analysis) * [Understanding the Business Model Canvas](https://www.initiateprosperity.org/management/business-planning/understanding-the-business-model-canvas)   *Comments:* |
| Attracting and retaining employees  *Resources*:   * [Getting It Right: The Essentials of Hiring Employees](https://313strong.initiateprosperity.org/management/human-resources/getting-it-right-the-essentials-of-hiring-employees) * [Steps For Hiring an Employee](https://313strong.initiateprosperity.org/management/human-resources/steps-for-hiring-an-employee) * [How to Find Quality Employees](https://www.initiateprosperity.org/management/human-resources/how-to-find-quality-employees) * [Attracting and Retaining Employees](https://www.initiateprosperity.org/management/human-resources/attracting-and-retaining-employees)   *Comments:* |
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