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| **BUSINESS PERFORMANCE PLAN** |
| Date |  | Contact | Business | Years in Business |
| 1 Year Goal(s) |  |
| 3-5 Year Goal(s) |  |

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| ****Step 1: Use the self-assessment scores to identify support areas****  | This is something I need to learn. | I understand this but have not yet applied. | I understand and apply, but could improve. | I understand this and apply it effectively. |
| **MONEY**  | **1** | **2** | **3** | **4** |
| Creating a Profit & Loss (Income Statement) |  |  |  |  |
| Creating a Balance Sheet |  |  |  |  |
| Using financial statements (Income Statement and Balance Sheet) to make business decisions  |  |  |  |  |
| Creating and using cash flow projections |  |  |  |  |
| Reading and improving my credit score |  |  |  |  |
| Understanding and implementing good bookkeeping practices |  |  |  |  |
| Calculating break-even and profit needed to reach goals |  |  |  |  |
| Understand and stay current on all of my business tax obligations (i.e., sales, payroll, income, etc.) |  |  |  |  |
| **MARKETING** | **1** | **2** | **3** | **4** |
| Defining and reaching target market  |  |  |  |  |
| Communicating product/service features and benefits effectively  |  |  |  |  |
| Communicating my competitive advantage  |  |  |  |  |
| Aligning my marketing plan to support my revenue and profit goals |  |  |  |  |
| Creating/utilizing a brand that represents my business clearly |  |  |  |  |
| Increasing the effectiveness of my website |  |  |  |  |
| Improving my social media marketing efforts |  |  |  |  |
| Engaging customers through email marketing |  |  |  |  |
| Using and understanding digital advertising |  |  |  |  |
| Creating effective content for my marketing efforts |  |  |  |  |
| **MANAGEMENT** | **1** | **2** | **3** | **4** |
| Utilizing time management strategies |  |  |  |  |
| Developing a plan to address risks (human, structural, technology, and cash management.) |  |  |  |  |
| Protecting your business and customer data |  |  |  |  |
| Working on strategy and vision |  |  |  |  |
| Hiring and managing employees  |  |  |  |  |

**Systems Notes:**

|  |  |
| --- | --- |
| **Accounting System:** **POS:** **Payroll:** **Inventory:**  | **Website Platform(s):** **Marketing Channels (i.e., Facebook, Yelp, etc.):** **Other:**  |

**Step 2** With your coach, review the scores and identify specific goals to achieve.

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| Goals & Initiate Resources | Planned Completion Date |
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