|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | **BUSINESS PERFORMANCE PLAN** | | | | | | Date |  | Contact | Business | Years in Business | | 1 Year Goal(s) |  | | | | | 3-5 Year Goal(s) |  | | | |  |  |  |  |  |  | | --- | --- | --- | --- | --- | | ****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.   |  |  | | --- | --- | | Goals & Initiate Resources | Planned Completion Date | |  |  | |  |  | |  |  | |  |  | |  |  | |