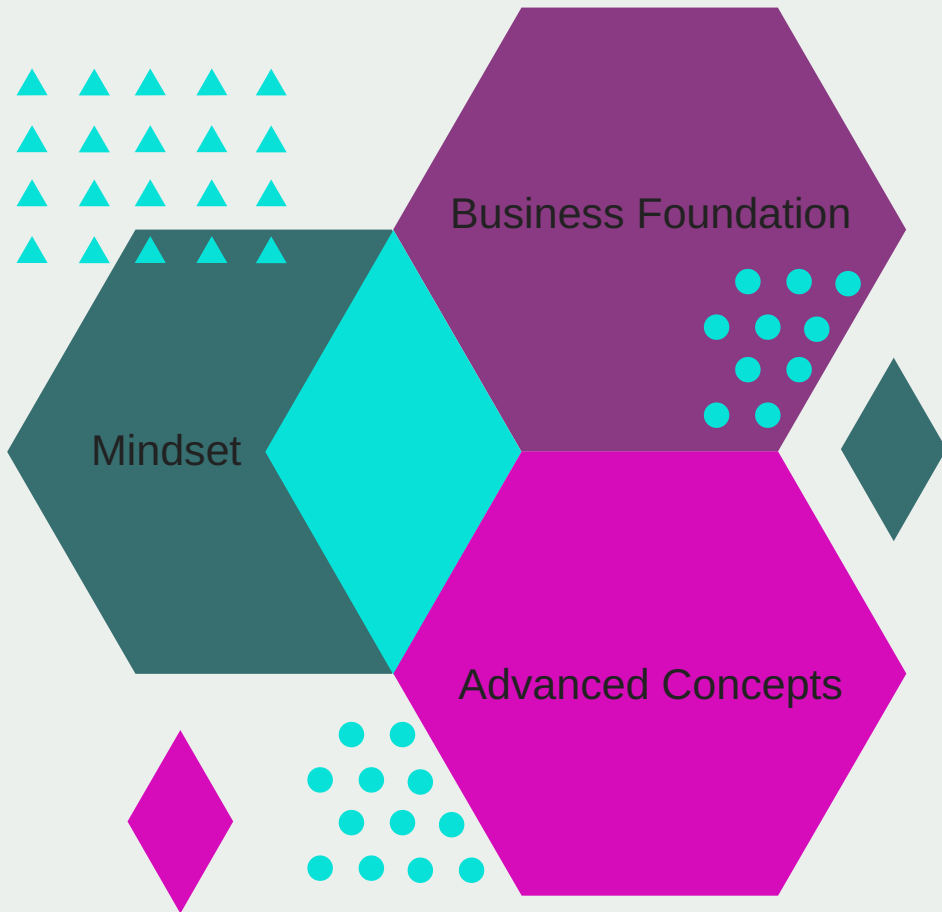


Blissful Business Checklist



BLISSFUL BUSINESS

*Business is Meant
To Be Bountiful
and Life is Meant to be Blissful*



Part 1: Business Foundation

Your Business Structure

Choose a business structure that suits you best

- o For Profit: LLC, Sole-Proprietor, S-Corp, Incorporated
- o Non-Profit or Pro-bono
- o Service or Product base, or Combination

Methodology for taking credit cards (Merchant acct, Paypal, Square)

Business checking account – keep separately from your personal account

Business savings for taxes, profit, emergencies

Business credit card – centralize all your business expenditures

Business Brand

- o Your Name
- o Legal name can be different than Brand name
- o Global, ie: XYZ and Associates, XYZ, Int'l, XYZ Enterprises
- o Consistency

Office space dedicated to your business even if in your home

Equipment needs

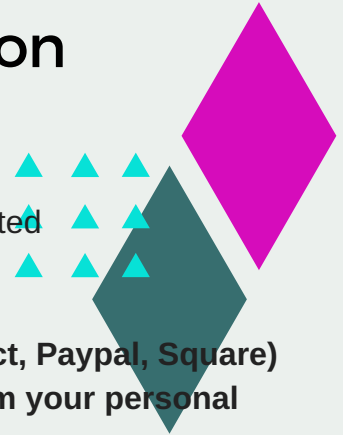
Insurance - liability when/if needed (only when you have clients)

Professional Support:

- o bookkeeper/accountant/CPA
- set up accounting system: Quickbooks, Xero, others (pros & cons)
- o lawyer: Legal Shield, Contracts / Terms / Agreements reviewed, Privacy
- o promotional
- social media & administrative
- website designer & administrative
- graphic designer
- print - GotPrint, VistaPrint, Other
- desktop publishing, ie: Canva, Snappa, Vectr
- speaking and networking

Who do you supply to? Whom do you want to serve?

- o Your Niche Market: What industry/industries?
- Realtors, Healthcare, Academia, Law, Companies: sm, mid, large, Public Sector



Describe your Ideal Soul-mate Client

- o Children/Teens, Women (age range), Men, Couples, Executive
- o Why it matters to be specific
- o Where are they? Where are you?
- o What do they need?
- o What solutions do or can you provide for them?
- o What's your story - can it relate to their story?

Finances

- o What to charge, Programs, Packages, Bundling products with service
- o Budget
 - business expenses
 - pay self first / payroll
- o Income
 - Time dedicated billable and non-billable hours
 - Calculate amount to generate

Website – Pages: home, about, offerings, contact, social links, other

- o website platform such as: Wordpress, Wix, Squarespace, Other
- o Obtain domain name(s) - ULR: GoDaddy
- o Register for hosting: Dreamhost, GoDaddy or web designer's affiliate
- o Website content: solving Client's needs
- o To offer pricing or not
- o Value offers: sample or complimentary session, Opt-in
- o Building your e-list
- o Collecting testimonials
- o Guarantee
- o Blog, Vlog, YouTubeChannel, Other

Tools

- o Client Relationship Management System (CRM)
 - AWebber.com, iContact.com, MailChimp, Constant Contact
 - Client List
 - Auto responder emails for marketing
- o Automated Appointment scheduling – TimeTrade, Calendly
- o ScreenShare - joinme, Any Desk
- o Online Video & Phone Platform - FreeConferenceCalling, Zoom, Tape A Call, Sing&Share



Social Media

- o Business Facebook page, Instagram, Twitter, LinkedIn
- o Post blog articles
- o Share business/niche related thoughts, tips, quotes regularly
- o Join niche related groups
- o Connect with other thought leaders in your niche and comment on their posts

Process

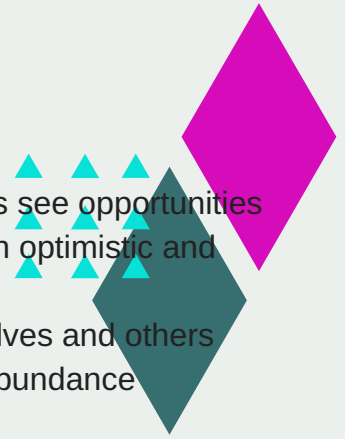
- o Create your playbook
 - Prospective client package including the following
 - Welcoming email
 - Bio
 - One of your favorite articles to build your credibility
 - Enrollment script
 - Negotiation skill building - win win win
 - Role Play with Business Coach or Colleague
 - New Client package or program
- Welcoming email
- Client Questionnaire
- Personal Profile Intake
- Coaching Agreement

Client Interaction Structure

- o Pre-call strategy form
- o Post-call recap form
- o Mid-session check in form
- o Centralized Session notes
- o Keep track of your coaching hours and your income by client
- o Setup 6 month/annual touch-base emails
- o Ask for referrals
- o Ask for testimonial for website and other promotional pieces
- o Ask for Google reviews and other applicable avenues
- o Setup drip campaigns through e-lists



Part 2: Mindset



Embrace the Entrepreneurial Mindset

- Given a set of challenges, successful entrepreneurs see opportunities
- Given a problem, successful entrepreneurs are both optimistic and pragmatic
- Successful entrepreneurs expect a lot from themselves and others
- Successful entrepreneurs operate from a state of abundance
- Successful entrepreneurs are persistent
- Successful entrepreneurs enjoy making a profit

Continue to invest in your development

- o Entrepreneurial publications
- o Money and Finance materials
- o Personal and Professional conferences
- o Master classes
- o Certification programs
- o Webinars
- o Mastermind group(s) initiated or joined
- o Networking groups
- o Strategize opportunities to speak

Attracting Ideal Clients

- o Referrals from friends, family, colleagues, and existing/past clients
- o Referrals from other professionals
- o Giving seminars, presentations, talks, workshops
- o Networking at local organizations
- o Website
- o Social Media - FB Live, Linked In Groups, Instagram followers
- o Interviewing people in your niche to learn about what they think, what they read, how they feel about your area of expertise.
- o Be interviewed on podcast, other webinar/tele-seminars, panels
- o Showcase your recordings and videos
- Meditation / Mindful apps, YouTube Channel, SoundCloud
- o Meetups
- o Present at National Conferences where your clients attend

Part 3: Some Advanced Concepts

- Automate your Client Management Process: Google Docs, HelloSign, DocuSign
- Hire an Assistant to maximize social media coverage & maintain/expand the website
- Write a book, an eBook or collaborate with someone else on a book
- Develop programs/products and create a spiral marketing system
- Create group coaching programs to leverage your business
- Develop webinars, teleseminars and learn how to launch new programs
- Speak and write regularly to continue creating value and to reinforce your position as an expert in your field
- Create group retreats
- Create your own E-Course

Have Fun!

Need to Set a Solid Foundation for your Business?

Want to Take Your Business to the Next Level?

Contact Barbara Now!

616-638-5625

www.BlissfulBusinessMentorship.com

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