

MODULE 12

STRATEGIC  
PLANNING & LONG-  
TERM SUCCESS

  
The Coach School

Workbook

ALLI WORTHINGTON

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# Strategic Planning & Long-Term Success

*You have clients. You have systems in place. You're nailing your marketing. Now it's time to level up for long-term success so you can enjoy the business you've worked so hard to build.*

## Lesson Checklist:

- **Training 12.1 : Working On & In Your Business**
- **Training 12.2 : How to Use Data to Make Smart Decisions**
- **Training 12.3 : When to Raise Prices**
- **Training 12.4 : When to Bring on a Team**
- **Training 12.5 : How to Build Your Profit**

# Pre-Module Activity

Building for long-term success is vital for every business. We don't just want to survive today and pay this month's bills; we want to be successful next year, five years from now, and 15 years from now.

Imagine your life and business in the future. **What would you like your future to look like in one year, five years, and fifteen years?**

## ONE YEAR VISION

## FIVE YEAR VISION

## FIFTEEN YEAR VISION

**I love your vision. Let's learn how to make it happen!**

# Working On & In Your Business

Think back to Jessica, our overwhelmed Enneagram coach. She was spending her time tirelessly working in her business... and she was burnt out. Can you relate?

**Right now, are you spending more of your time working ON your business or IN your business?**

Working ON your business means creating organized systems that you routinely follow so all your work is done in a systematic way. When you do this, you show up to work and you know what to do next and in which order to do it.

**What would need to change for you to start working ON your business and not IN your business?**

It will be a huge investment to set up all the systems your business needs to succeed, but it will be worth it!  
**Are you ready to commit to this process and see it through?**

- YOU BET!!
- I'M ALL IN!
- CAN'T WAIT TO GET STARTED!
- NO EXCUSES HERE!

As we go through this process, I want you to imagine your goal is to have 5,000 independent coaches working for you. Your goal is that every one of these coaches is coaching clients the same exact way you do.

As we create systems and routines, we want to ensure that even the least experienced coach would be able to use them to be the exact kind of coach you are.

It would be a good idea to pause after each system is built and ask yourself, "If someone with no experience in my business took over today, would this system help them complete this task in the exact same way I would?"

Now that we've laid the groundwork, let's get started!

### ► *Step 1: Define Your Business*

**What do you want your business to do for your clients?**

**What do you want your business to feel like to your clients?**

What do you want your business to achieve for you?

What is the one thing your business MUST do for your CLIENTS to make it a success in your eyes?

What is the one thing your business MUST do for YOU to make it a success in your eyes?

## TRAINING 12.1: WORKING ON & IN YOUR BUSINESS

Using your answers to the previous questions, write out a vision or mission statement for your business. Here are a few examples to get you started.

**"I create tools to help you build your dreams, grow your faith, and love your life!"**

- Alli Worthington

(Note: mine is more vague because I balance being an author in the faith space and entrepreneur. My statement was very niche-focused 10 years ago!)

**"Beth is passionate about coming alongside individuals and helping them re-write their story, allowing them to see that lasting change, meaningful relationships, and a life of deep purpose is possible."**

- Beth McCord, Enneagram Coach

**"Online pilates workouts. Encouraging Community. Inspiration for a balanced life."**

-Robin Long, Fitness Coach and Instructor

It may take weeks, months, or years to find the perfect vision statement for you and your business. And you know what? That's okay. **But for today, write the best statement you can and then go on to the next step.** It's better to make progress with a good vision statement than to stall out waiting for when you can write the perfect vision statement!

*Mission  
Statement*

► *Step 2: Pay Attention to What Makes Your Business Work*

The systems you build for your business need to be systems that help you do what **MUST** be done in order to steadily move your business forward.

**What tasks do you do that are vital to the day-to-day operation of your business? Write specific tasks under each of the areas below. Add more areas as needed.**

OPERATIONS

CLIENT MANAGEMENT

FINANCE

SOCIAL MEDIA

EMAIL

SALES

AUDITS

OTHER

OTHER

## TRAINING 12.1: WORKING ON & IN YOUR BUSINESS

What tasks do you do that are vital to the growth of your business? Write specific tasks under each of the areas below. Add more areas as needed.

MARKETING

SOCIAL MEDIA

NETWORKING

LEARNING / PERSONAL DEVELOPMENT

DEVELOPING NEW PRODUCTS / SERVICES

OTHER

OTHER

Are there any other vital tasks to the health and growth of your business that you haven't yet listed?

Great job! You've just written down all the things that make your business work. Now, it's time to take those tasks and put them into organized systems. No more burnout. No more stress cycles. Let's turn your business into a well-oiled machine that works for you!

### ► *Step 3: Systemize What You Do Into Routines*

Beginning with the first area under Step 2, OPERATIONS, begin to make a plan for how you will execute the tasks you listed.

**Some questions to ask yourself are:**

- How often must each task be done?
- What is the goal of this task?
- What resources are needed to complete this task?
- How long does it take to complete each task?
- Are there other tasks that use the same operating systems that I can group with this task?
- In what order should I complete these tasks to be the most efficient?
- What day and time should this task be done?
- Are there any tasks that are unnecessary?
- Is the way I currently do this task working? Or are there changes that should be made?

Use the space below to write a rough draft of the routine you will use to complete the tasks in each of the areas listed above. If you are feeling unsure of how to create these systems and routines, start by grouping similar tasks together.

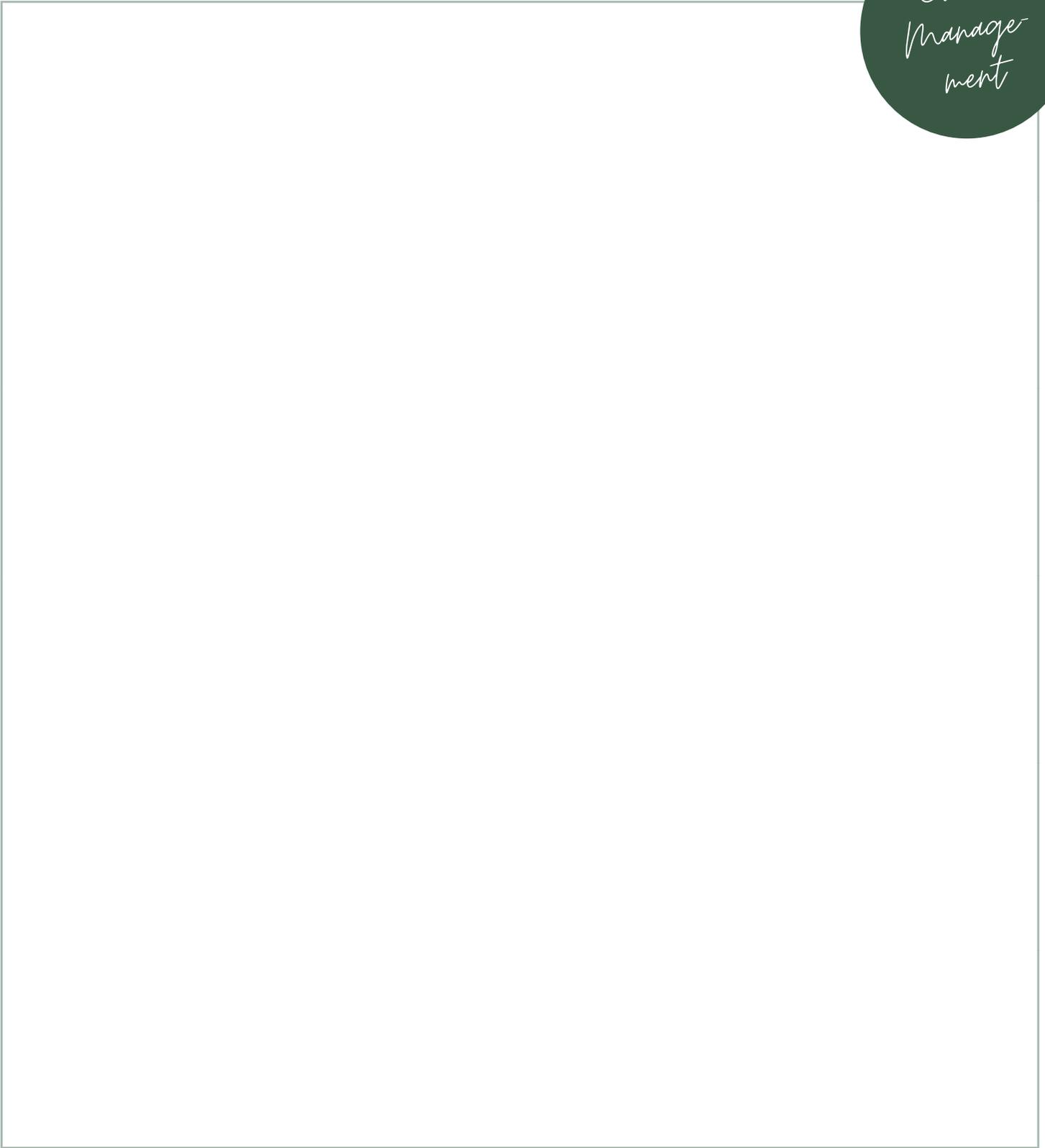
For instance, under client management, you may group together check email, respond to texts, and catch up on basecamp. These three could become a morning client check routine. You may group together website SEO, analytics, and updates. These could be combined into a routine website audit that you perform once a month. The first step is to just get started!

Any system is better than no system. And the only way to have outstanding systems is to start with okay systems and then slowly make them better over time.

Whatever you do, don't stop here! Completing this workbook will revolutionize your business! I promise!

Operations

Client  
Management



Finance

*Social  
Media*

Email

*Sales*

Audits

Marketing

networking

Learning &  
Personal  
Development





Other

Other

I want you to work towards writing a manual for each of these areas. Write in detail how to complete each task. Once you've written the manual, place a checkmark next to each area. Remember, your goal is to make what you do replicable for 5,000 other coaches, no matter their skill or experience level.

One day when you hire employees, these manuals will be ready and waiting! Until then, the process of creating your systems and writing your manuals will be incredibly beneficial for the health and success of your business!

### ► *Step 4: Do the Routine, Systemized Work*

Now that you have your systems written down, I want you to schedule them in your calendar! Set them as recurring tasks. Stay committed and do the systemized work!

**Add all your routines to your calendar before you move on to the next step.**

### ► *Step 5: Be Innovating, Evaluating, & Making Necessary Changes*

**Always be working ON your business.**

You've done the hardest part of shifting from working IN your business to working ON your business! You need to keep working on your business moving forward.

**Schedule time to audit your systems after you've had them in place for one month.**

As your systems develop, you'll find you need to audit them much less often. Maybe once a quarter or twice a year. But you should never get to a place where you are no longer innovating, evaluating, and making the necessary changes your business needs to grow!

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When you work IN your business, you are in a cycle of stress: always doing what needs to be done but never making progress forward. When you work ON your business, you have an organized system to do the work efficiently. The systems you put in place through this training and workbook will lead to long-term success!



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# How to Use Data to Make Smart Decisions

Business owners make smart decisions when they make data-driven decisions. In order to make data-driven decisions, you need to set aside time to audit your business.

**Do you currently audit your business? If so, what audits do you do? How often do you do them?**

You should be auditing your time, social media, and website every month. Let's audit each of these right now.

► *Time Audit*

**What activities am I doing that are helping me reach my goals?**

What am I spending time on that isn't working?

Have I been spending my time in a way that prioritizes the things that are most important for my business? Explain.

Is there anything I have been prioritizing that isn't actually a priority? Explain.

Based on your responses to the questions above, how will you adjust how you spend your time?

► *Social Media*

Next up is your social media audit. Take time to answer the questions below based on your social media account analytics.

What brought people to my page?

What kept people on my page?

What links in my bio were clicked the most?

**What posts or stories resonated with my audience the most?**

(Eg. You received lots of comments or messages pertaining to this post.)

**What did people like the most?**

**What did people comment on the most?**

**What did people share the most?**

What did people save the most?

You don't need to reinvent the wheel every month on social media, you just need to do more of what works and less of what doesn't!

Remember that social media success comes from doing more of what works and less of what doesn't!

How will you adjust your social media strategy and content based on the above answers?

► *Website*

Now, onto auditing your website. Answer each of the questions below.

What are your most viewed pages?

Do you have a strong call to action on each of those pages? Do you have a lead magnet to capture emails on those pages? Explain.

What are your best traffic sources leading people to your website?

How can you better invest in the things that are bringing traffic to your website?

Based on your answers above, what adjustments will you make to your website?

## ► *Other Audits*

The final thing I want you to audit every month is any other systems you have that you're wondering how effective and productive they are.

This could be:

- Email Campaigns/Newsletters
- Paid Ads
- SEO
- Client Management
- Etc.

Your audits for each of these areas should focus on finding out what you're doing that's working and what you're doing that isn't working. Then, make adjustments to do more of what works!

**The last task you need to complete in this section of the workbook is to be sure you have time scheduled monthly to audit your business.**

As a business owner, you should always be auditing your business to find the best path forward. And your best path is to follow the data! If you make an effort to always be doing more of what's working and less of what isn't working then your business will be a success!



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# When to Raise Prices

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Raising prices is essential to building a business that has continual growth and long-term success. Your price point should NOT always stay the same.

**How do you feel about your current price point? Is it meeting your financial needs? Is it realistic for your perfect person?**

Let's revisit your perfect person. **Briefly describe them and what you think their budget for hiring a coach could be.**

Length of time coaching doesn't always determine your price, but it can determine your level of thought leadership. The longer you coach, the more consistency and thought leadership you have established.

How do you know if you are a thought leader? A thought leader is someone people consistently seek out for advice in a specific area of expertise.

Are you a thought leader in your area of expertise? Why or why not?

What can you do to become or grow in being a thought leader in your area?

Perceived value is how much benefit your potential clients feel like they will get from working with you. When you communicate clearly the benefits of working with you and how you can help them meet their goals, your perceived value increases.

Take a look at your website, recent marketing materials, and social media to answer the following questions.

**Do you clearly and continually communicate the benefits of working with you? If not, how might you start sharing this?**

## TRAINING 12.3: WHEN TO RAISE PRICES

Do you communicate how you can help potential clients meet their goals? How so?

Do you share client testimonials regularly? If not, how will you begin to do this?

The longer you are coaching in your field, the more trust you build. We've talked about building trust in different ways throughout this entire course, so evaluate how you are doing building trust in these ways:

How are you doing at sharing testimonials from current and past clients?

Are the people you collaborate and network with helping you build trust?

Yes  
 No

Do you have a weekly show that establishes your thought leadership?

Yes  
 No

## TRAINING 12.3: WHEN TO RAISE PRICES

Use this space to elaborate on any of your answers above:

Above, we evaluated the four factors in raising prices: your niche's ability to pay, thought leadership, perceived value, and trust. The best news is that if you've been committed to completing the lessons and doing the workbooks for each module in this course, then you've been working on building these four things all throughout this course.

**Based on these factors, what do you think about your current prices?**

**What can you be actively working on so that you can raise your prices in the future?**



# When to Bring on a Team

You should hire someone when you have more money than time. When you have more time than money, you do it yourself.

Have you had any of the following thoughts?

I feel overwhelmed.

I don't feel like doing some tasks.

I feel like I need an assistant to be legitimate.

**Why should you NOT hire someone based on feelings?**

Here's the reason you aren't going to hire someone based on feelings: Feelings usually don't manage money very well. Every dollar counts. Don't pay for something you can do yourself.

**Do you have more time or more money right now?**

More time

More money

**If you have more money and it is time to hire a team, what tasks will you hire out for?**

Remember, you want to hire for your weaknesses.

## TRAINING 12.4: WHEN TO BRING ON A TEAM

Will you find a contractor for these tasks or do you need to hire someone?

How will you ensure the person you hire uses the systems you put in place?

Are there any tasks that you can automate so you don't have to hire out for them? If yes, which tasks?

You are not going to bring on a team based on your feelings but rather based on your income. **When you have more money than time, it's the right time to bring on a team.**

You're going to hire people to do the things that you're weak at, and when you hire them you're going to have them use the systems you created so that your business continues to operate as if you were still the one doing the work. This is the smart way to bring on a team!



# How to Build Your Profit

"Profit-First" Finances are all about doing exactly that: putting your profit first so you can build intentionally and sustainably, moving away from the survival trap of trying to find profits after taking out your expenses.

I want your finances to live by this formula:

$$\text{Sales} - \text{Profit} = \text{Expenses}$$

## ► *Setting Up a Profit-First System*

First I'm going to walk you through setting up a profit-first system. There's a lot of information here, so go at your own pace! Most of this you can do now, but there are a few sections you'll want to revisit in a few months to reflect on how well you achieved the goals you set today.

### ▼ STEP 1: SET UP YOUR BANK ACCOUNTS

There are lots of great online banking options out there, I want you to google and find a bank you're comfortable with that has free checking and then set up four different bank accounts there, naming them as follows:

#### YOUR FOUR BANK ACCOUNTS

- **One** - Your Profit Account
- **Two** - A Tax Account
- **Three** - Your Owners Pay Account
- **Four** - Your Current Operating Expenses Account

Why four different bank accounts? This removes the temptations to "borrow" from one to compensate for a shortfall in another. It forces you to keep the big picture in mind.

## TRAINING 12.5: HOW TO BUILD YOUR PROFIT

Take an instant assessment of where you are right now. How much profit are you actually allocating? Have you taken any funds from that account to cover operating expenses rather than for growing your business? Be honest in your assessment so you can move forward from here.

Now it's time to set up your four individual bank accounts. Place a check mark in the circle after you've set up each account!

- 1. Your Profit Account**  
I set up my profit account at \_\_\_\_\_
  - 2. A Tax Account**  
I set up my tax account at \_\_\_\_\_
  - 3. Your Owners Pay Account**  
I set up my owners pay account at \_\_\_\_\_
  - 4. Your Current Operating Expenses Account**  
I set up my current operating expenses account at \_\_\_\_\_
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### ▼ STEP 2: ALLOCATE YOUR FUNDS

For the second step, you are going to allocate your funds in this order, aiming to split them as close to these percentages as possible:

- First, pay your profit account. You want to aim to allocate 15% here.
- Second, pay yourself. Ideally you'll be allocating 40% for your owner's pay/salary account.
- Next, allocate your tax. This will be around 25-35% depending on your tax bracket; be sure to ask your accountant about this and get the percentage right.
- Last, allocate all remaining funds into your current operating expenses account. This will end up being anywhere between 10-20% depending on your specific tax bracket.

## TRAINING 12.5: HOW TO BUILD YOUR PROFIT

**Determine which percentages you will allocate to each account.** For tax, you'll need to reach out to an accountant to determine the correct bracket. You'll do a little math at the end to find the operating expense percentage. You can write actual dollar amounts next to each account based on last month's income to help you practice the allocation.

ACCOUNT	PERCENTAGE	ACTUAL AMOUNT	NOTES
Profit Account	15%		
Owner's Pay Account	40%		
Tax Account*	25–35% Actual:		*speak to your accountant to ensure you allocate the correct tax bracket
Operating Expenses Account*	10–20% Actual:		*all remaining funds will be allocated to your expense account

Because coaching is a low overhead business, you can take more profits because you don't have to have hundreds of thousands in an operating account. As a one-woman show, you likely won't have to worry about paying a lease or big payroll.

Set a small, attainable goal that will move the mile marker closer to where you want to be. It may be that you want to increase profit by 3%. Consider how you can drive more of your ideal clients to your website or platforms. (Eg. Can you run a campaign with a seasonal coaching package that includes a free coaching call?)

Maybe you want to decrease your operating expenses by 5%. Where can you cut costs? Where are you spending money on subscriptions or programs that you no longer use in your business? Consider what the most important goal is for you and work towards that number.

**Spend some time brainstorming goals below. We'll set goals later in this workbook.**

### ▼ STEP 3: REASSESS REGULARLY

I want you to get out your calendar and schedule all your payables to be run only on set dates. Place a check mark in each circle once you've scheduled the repeating dates/events on your Google calendar.

Twice a month (Eg. on the 10th & 25th), you will pay your bills and move your funds to the correct allocated account. This will allow you to get a feel for where your money really goes.

- 10th of each month pay your bills and move your funds to the correctly allocated account
- 25th of each month pay your bills and move your funds to the correctly allocated account

Now, full disclosure, I personally don't have an account for taxes because I pay mine every month instead of every quarter as required for an LLC. I like to give my charitable giving a taxes every month so I never have to worry about it. But if you are going to pay your estimated taxes each quarter then set up a tax account.

Then every quarter you'll pay yourself a dividend on the first day of each new quarter. This means you can take 50% of the money in your profit account as your dividend, and then leave 50% in your mind as a cash reserve.

- 1st day of each new quarter pay yourself a dividend. This means to take 50% of the money in your profit account as your dividend, and then leave 50% in your mind as a cash reserve.
- Pay your estimated taxes from your tax account (unless you pay this monthly!)

Well done! You've officially set up a profit-first system that will serve you for years to come.

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### ► *Implementing Profit First*

Now we're going to look at a few keys to successfully implementing profit first. They're simple, but super helpful in starting out. So first, start small. Find something small and attainable to start with and then build from there. Second, take intentional steps towards that goal. Then, once you've achieved that move forward to the next goal.

**1. Start Small**

**2. Take intentional steps towards that goal**

▼ SMALL ATTAINABLE GOAL #1

SETTING THE GOAL

What's one small, attainable goal I can start working towards today? \_\_\_\_\_

What's one thing I can do today to build towards this goal?

ACHIEVING THE GOAL

It took me this long to achieve this goal (days/months): \_\_\_\_\_

I got there by:

Now you've completed your first goal, move on to your next small attainable goal:

▼ SMALL ATTAINABLE GOAL #2

SETTING THE GOAL

What's one small, attainable goal I can start working towards today? \_\_\_\_\_

What's one thing I can do today to build towards this goal?

ACHIEVING THE GOAL

It took me this long to achieve this goal (days/months): \_\_\_\_\_

I got there by:

Well done! You've completed TWO small attainable goals. Keep up the momentum by building on these steps with another goal.

▼ SMALL ATTAINABLE GOAL #3

SETTING THE GOAL

What's one small, attainable goal that I can start working towards today? \_\_\_\_\_

What's one thing I can do today to build towards this goal?

ACHIEVING THE GOAL

It took me this long to achieve this goal (days/months): \_\_\_\_\_

I got there by:

You got this! Keep stringing together a series of small steps in the right direction and then repeat this process again and again until you get to where you want to be. Remember, the goal is never major overhaul. Instead you want to be making regular incremental changes that lead to big results.

► *Growing Profit First*

This is something you'll want to come back to every quarter to reassess how you are going with your profit first system.

▼ STEP 1: TAKE AN INSTANT ASSESSMENT

How much profit are you actually allocating? \_\_\_\_\_

Have you taken any funds from that account to cover operating expenses rather than for growing your business? \_\_\_\_\_

Remember, BE HONEST.

▼ STEP 2: SET ONE SMALL, ATTAINABLE GOAL

What's one small attainable goal that you can work towards this quarter? \_\_\_\_\_

What's it going to take for you to achieve this goal?

▼ STEP 3: REASSESS REGULARLY

Health check-ups are only as good as they are consistent. Take this assessment at the end of every quarter.

Did you achieve your goals?

- Yes! Celebrate the win! Reward yourself for achieving this milestone.
- No? Reflect below.

Why not? What unexpected challenges did you come up against? How can you overcome this hurdle to get success in this next quarter?

Maybe you need to consider a smaller percentage as a starting place and work towards that before shooting for the stars, or maybe it's as simple as cutting out your favorite brand pens that are three times the cost of any other type of pen, just for a moment while you work at decreasing your operating expenses.

Remember, we're wanting to create long-term financial freedom so you can buy all the pens you like!

Profits grow as you get super comfortable making these small steps in the right direction regularly, rather than trying to make larger dramatic changes on a dime. The goal is to just keep moving forward. This is what builds momentum for change.

► *Increasing Efficiency*

Now we've covered how to set up a profit-first system, implement it effectively, and practically grow our profits, now let's look at long-term steps to increasing your efficiency.

▼ TIP #1: Every week choose one area to focus on in your business and ask it these questions.

The area I will be working on this month is: \_\_\_\_\_

How can I get 2x the results with half the effort and expense?

How can I do this task significantly faster?

Can I automate this task? If yes, set up a plan!

What can I do differently, but much better?

What big steps forward can I take?

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▼ **TIP #2: Sell more productively.**

The trick to selling more productively is to sell smarter, not work harder. You want to be a student of yourself and your business. Watch and learn what works for you, identifying what it is specifically that is working, and then create a system around it, developing it into something you can teach others.

What's one thing that is working for me that I can systemize?

What type of resource can I build this into so it can help others?

▼ **TIP #3: Duplicate your best clients.**

20% of your clients will provide 80% of your income. If you can identify who they are and go over and above in loving and serving them well, they will be so impressed by you that they will bring more of your perfect client to you because of the relationship you have established with them.

Great work! There you go, you now know how to use profit first principles to set your business up for financial success. Remember:

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$$\text{Sales} - \text{Profit} = \text{Expenses}$$

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The steps that I've taken you through are purposeful and important. They're all building you a business that will be successful for years and years to come. And part of that success is in building a business in which you can increase your prices as your value as a coach increases.

BRAVO! You completed The Coach School! Over the last 12 weeks, you put in so much time and energy refining your business plan and practices. If there's a module you've skipped or not completed the work for, let me encourage you to go back now and do the work.

And remember, even though you finished The Coach School, this is only the beginning. I hope you feel equipped and eager to continue implementing marketing strategies, developing services, and serving your perfect person. You're doing amazing!



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# Wrap Up

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*Great work finishing up this module and The Coach School! You're one step closer to booking clients and growing your business. Take a moment to reflect on all you learned, and then don't forget to visit the bonuses you unlocked.*

My biggest takeaway from this module is . . .

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The changes I made based on this module that will help my business be successful are . . .

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Some things I learned in this module that I wasn't able to focus on right now but want to come back and work on later are . . .

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