

# Quarterly Strategic Action Plan

Date: \_\_\_\_\_

STEP 1

## Our 5 Biggest Victories for the Quarter

- 1.
- 2.
- 3.
- 4.
- 5.

## Our 3 Biggest Lessons

- 1.
- 2.
- 3.

## Application Going Forward

## Cheat Sheet List to Determine Your Top 3 Focus Areas for Growth

### **Focus Area One: *Pushing back your current Limiting Factor.***

Your first Focus Area should be something that directly helps you push back your number one Limiting Factor for your business. By definition your Limiting Factor is the single biggest current constriction to growth, and hence it is a great leverage point to focus on.

### **Focus Area Two: *Seizing one of your biggest opportunities.***

Your second Focus Area should be about seizing one of your company's biggest opportunities. You win the game of business by effectively leveraging big opportunities, not by inching your way along accepting the status quo. This is why each quarter you should choose one of your biggest opportunities to invest some of your best resources on taking advantage of. Often some of the best opportunities will take more than one quarter to seize and because of this you may find yourself working on this Focus Area for several quarters.

### **Focus Area Three: *Mitigate one of your gravest threats.***

Every business faces threats – those things that could deeply hurt or even kill a business. Pick one of your top threats to mitigate this quarter.

# Quarterly Strategic Action Plan

Sweet Spot Analysis #1 Our #1 Biggest Limiting Factor is:	Sweet Spot Analysis #2
Now list 10+ potential ways to significantly push this limiting factor back in a smart, effective manner:	Now brainstorm 10+ potential solutions to your chosen focus:
LHHR	LHHR
1. <input type="checkbox"/> <input type="checkbox"/>	1. <input type="checkbox"/> <input type="checkbox"/>
2. <input type="checkbox"/> <input type="checkbox"/>	2. <input type="checkbox"/> <input type="checkbox"/>
3. <input type="checkbox"/> <input type="checkbox"/>	3. <input type="checkbox"/> <input type="checkbox"/>
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15. <input type="checkbox"/> <input type="checkbox"/>	15. <input type="checkbox"/> <input type="checkbox"/>

### Guiding Strategic Reminder:

- Build on your strengths.
- Focus your best resources and people on your biggest opportunities, not your biggest problems.
- Each quarter, work to meaningfully mitigate one or more of your gravest business threats.
- Push back your #1 limiting factor.
- Focus first on what needs to be done, not on what you want to be done.
- Focus on fewer, better things.
- Feed your winners; starve your losers.

# Quarterly Strategic Action Plan

## STEP 3

1 Focus Area One:	3 Action Steps/Milestones	4 Who	By When
2 Criteria of Success:			

1 Focus Area Two:	3 Action Steps/Milestones	4 Who	By When
2 Criteria of Success:			

1 Focus Area Three:	3 Action Steps/Milestones	4 Who	By When
2 Criteria of Success:			

# Sample Quarterly Action Plan

Focus Area One:	Action Steps/Milestones	Who	By When
Lead Generation: Getting more people in the door!	<input type="checkbox"/> Lay out current system and tracking to see what historic performance reveals. Use insights in next action step to pick tactics to increase store visitors.	John	1/15/XX
<b>Criteria of Success:</b> » Have a baseline scorecard in place that tracks daily traffic through the store. » Decide on the top 2 marketing ideas to implement for Q1 and implement them (with simple metrics to track results). Rough system laid out for each.	<input type="checkbox"/> Conduct “Sweet Spot” Analysis and choose the top 2 marketing ideas to implement in Q1. Rough out plan to implement and systematize each.	John	1/31/XX
	<input type="checkbox"/> Create a draft “Marketing Scorecard” to use to track daily key marketing numbers (and store sales by one breakdown).	John	1/31/XX
	<input type="checkbox"/> Checkpoint 1: How is KPI going? Review how implementation of 2 new tactics going. What is working well? What simple tweaks should we make?	John	2/28/XX
	<input type="checkbox"/> Review status at end of quarter and then refine next steps for Q2 based on where we stand.	John	3/21/XX
<b>KPI:</b> # of Qualified visitors to store per day			

Focus Area Two:	Action Steps/Milestones	Who	By When
Begin to systematize the “sales associate” customer service role of our business.	<input type="checkbox"/> Brainstorm all the “sales associate systems we think we’ll eventually want for our sales associates, from hiring, to training, to doing the sales associate role on the showroom floor. Prioritize this list and pick the top 2 systems to create in Q1.	Sarah	1/15/XX
<b>Criteria of Success:</b> » Have an outline of the “working with customer” sales associate part of our business (we’ll flesh out these systems over Q2 and Q3). » Have chosen a build out version on one of the two most important front desk systems.	<input type="checkbox"/> Have system one completed and the team trained on its use.	Sarah	2/7/XX
	<input type="checkbox"/> Checkpoint: How is system working? What is going well? What refinements need to be made? What training adjustments are needed? Lay out key action steps.	Sarah	2/28/XX
	<input type="checkbox"/> Have 2nd system built and the team trained to use. (Checkpoint to review and refine in early Q2).	Sarah	3/15/XX
	<input type="checkbox"/> Review list of “sales associate” systems needed. Decide on next 2-3 most important systems to build and implement. Rough out a plan to do this for Q2.	Sarah	3/30/XX
<b>KPI:</b> % Completed (estimate)			

Focus Area Three:	Action Steps/Milestones	Who	By When
Hiring process for new sales associates.	<input type="checkbox"/> Create draft of job description and help wanted ad. Review both with Pam. Revise based on her input.	Sarah	2/15/XX
<b>Criteria of Success:</b> » Have a written job description and help wanted ad. » Written outline of interview process with key questions and qualifications. » Written outline of a “new hire” orientation process to follow.	<input type="checkbox"/> Create draft interview process, key questions to ask, and the 3-5 “must have” qualifications to hire. Review draft with Pam and revise based on her input.	Sarah	3/7/XX
	<input type="checkbox"/> Create draft outline of new hire orientation process. Review with Pam and revise based on her input.	Sarah	3/21/XX
	<input type="checkbox"/> Review list of “sales associate” systems needed. Decide on next 2-3 most important systems to build and implement. Rough out a plan to do this for Q2.	Sarah	3/30/XX

# Maui Mastermind Clients Grow *5x Faster than Average*, While Reducing the Owner's Working Hours by 20 or More per Week!

A Proven System to Grow Your Business – and Get Your Life Back!

## Learn How to Grow Your Business **WITHOUT** Sacrificing Your Family, Health, or Life!

Most business owners want growth - but they're afraid they'll have to sacrifice their lives in order to achieve that growth.

But it doesn't have to be that way. When you scale your business the right way, you get growth AND you get increased freedom.

For over a decade now, we've helped our business coaching clients build thriving owner-independent companies. On average, *our clients enjoy an annual growth rate that is 5 times higher than the average privately held company in the United States*, while at the same time increasing their companies' Owner Independence Index by a whopping 194.5%. This means our clients earn more, and work less. In fact, *a typical client reduces his or her work week by 20 hours or more!*

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### What's Included in My Free Trial?

Building your business is a journey - but not every business owner will reach the finish line. In fact, many business owners are stuck - unable to break free and enjoy the control and the freedom that comes from building their company the right way.

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**In order to help you succeed, we give you the tools you need from day 1 to start strong. Your trial includes:**

- ✓ Bi-weekly private, one-to-one coaching sessions with a Maui Mastermind business coach.
- ✓ Weekly online accountability checks-ins (takes just 5-10 min. each)
- ✓ Small group coaching sessions to troubleshoot challenges and accelerate implantation.
- ✓ Access to our most popular training videos and short courses in our Business Owner Success Library
- ✓ Access to our Facebook business community of over 500+ successful business owners
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*“We have two preschools in southern California serving 355 kids every day. Before Maui my wife was working 80 a week with little time for our home life. Today she is down to working 40-50 hours a week. Not only have we grown professionally in the process, but we’re about to open our third location, something that we couldn’t have done without Maui Mastermind.”*

– Keith Scholfield  
Great Foundations Montessori

*“The results speak for themselves: Last year my business generated 9-times the operating profit than it did when I joined Maui 5 years ago. And my net worth has increased tenfold. I have more time off, am more relaxed and a much better quality of life. It’s really hard to beat that return on my investment.”*



– Jennifer Lyle  
Software Testing Solutions (STS)



*“Eight years ago our sales were stalled at \$450,000 and I was tied to the business, working long days with clients and doing admin and billing at night. They helped me change that. Eight years later, we’ve grown our sales to \$5 million per year, but best of all, the company is no longer reliant on me. We have solid systems and a strong team in place who create more value for our clients than I could have ever imagined.”*

– Blake Schwank  
Colorado Computer Support