



EDITABLE WORKBOOK

BUSINESS ***OPTIMISATION***

**Identifying Revenue Opportunities
& Profit Leakage**



Your Ideal Business

Everyone has a different idea of what is an "Ideal" business. In order to qualify as Ideal, a business needs to provide Income, Freedom and Scale. Consider having lots of income but no freedom to enjoy it, or plenty of freedom but low income (not ideal either). Have a think about your ideal income given that your business is primarily responsible for funding your ideal lifestyle...

What Financial Goals Does Your Business Needs to Fund?

- Paying off debts e.g. mortgage ☐
- Education for your children ☐
- Contributions to super fund ☐
- Looking after all family needs ☐
- Home you've always wanted ☐
- Ultimate holiday destination ☐
- Dream car you've always wanted ☐
- Renovations that you'd like ☐
- Investments for passive income ☐
- Properties to build a portfolio ☐
- Helping parents into care ☐
- Helping kids into houses ☐
- What else...

Of all your financial goals, which one is your top priority?

#1 Financial Goal

Ideal Personal Income

What should we be targeting per annum (within the next 1 - 3 years)?

\$

Basic Financial Metrics

Sales

\$

Cost of Sales

\$

Gross Profit

\$

Wages

\$

Overhead

\$

Net Profit

\$

Break Even Sales

\$

Days per Month

days

Months per Year

month

Hourly Rate

\$

Strategy Selector: Margins

The key measurement in your Finance Systems is how the strategies improve the margin you generate from the products and services you sell. Select the top 3 that are highest priority to work on to achieve the goals you want...

Top 3 Strategies

Optimisation Results

Pricing Gains:

\$

Cost Savings:

\$

Strategy Selector: Productivity

The key measurement in your Management Systems is how the strategies improve the productivity you generate from the people and systems in your business. Select the top 3 that are highest priority to work on to achieve the goals you want...

Top 3 Strategies

Optimisation Results

Productivity Gains:

\$

Wage Savings:

\$

Strategy Selector: Sales & Marketing

The key measurement in your Promotional Systems is how the strategies improve the leads you generate from your target market and the sales tactics that convert your leads into additional revenue. Select the top 3 that are highest priority to work on to achieve the goals you want...

Top 3 Sales Strategies

Top 3 Marketing Strategies

Optimisation Result

Sales & Marketing Gains:

\$

Size of the Prize

The amount below represents how your business will financially improve with the implementation of the strategies from each of the 4 Foundations...

Size of the Prize

\$

Monthly COI

\$

Implementation ROI

:

Notes: