Business Development Master Checklist

This is an easy-to-reference version of the master checklist that starts on page 266 of Heart Centered Business. For more complete descriptions of each item, the version in the book will help you out.

Creation: The First Stage of Development

Business Foundations

- Awareness of your Jewel, the inner sense of uniqueness, beauty, and power that your heart carries.
- One Compelling Sentence, the one sentence, conversational, non-marketing-language way to say what you do.
- Customer-Focused Story, a more in-depth story of your business, used as a template in marketing.

Website and Social Media presence

- Basic brochure website, with beginning message, One Compelling Sentence, adding Customer-Focused Story as it develops.
- Website is free or inexpensive, without expensive design elements.
- Maybe presence on one social media platform, experimenting with connecting, posting, being visible.

First Journey Marketing: Reaching new people.

- Neediness and fears about being visible and taking up space faced and worked through.
- Regularly reaching out to new people within your network.

Second Journey Marketing: Staying in contact with your audience.

- Neediness and fears around speaking up, taking a stand faced and worked through.

- Finding your voice, starting to develop your position, opinions, stance and speaking it to your audience.

Third Journey Marketing: Referral marketing.

- Neediness and fears around asking for referrals faced and worked through.
- Clarity about what you are asking referrers to do.

Garden Path

- Craft your first, most basic offer.

Selling

- Client questionnaire.
- Resonant pricing set for offers.
- "After Yes" details clear, paperwork, flow in place.
- Neediness and issues around sales faced and worked through.

Money

- Neediness/issues around money faced and worked through.
- Business and personal accounts separated from each other, each with sub-accounts, such as "vacation" "taxes" "prudent reserve."
- Celebration and fun around money in place.

Support/Systems

- Contacts/database system in place.
- Basic information sorting/filing system in place.

Celebration/Appreciation, and Life Enjoyment

- Developing habit of noticing and appreciating successes on a weekly basis.
- Habit of celebrating successes before moving on to the next project or goal.

Concentration: The Second Stage of Development

Business Foundations

All handled in the first stage.

Website and Social Media presence

In addition to the pieces in place from the First Stage:

- Developing a more effective website, what Heart of Business calls the Basic 8, the basic pages that are needed to connect with new visitors.
- Still keeping design expenses more modest.
- Setting up a subscription form that captures email addresses and adds them automatically to an autoresponder.
- Create free-giveaway for new subscribers.
- Create an online sales page for each offer. May lead to a buy button, but more likely an inquiry form.

First Journey Marketing

In addition to the pieces in place from the First Stage:

- Reaching out not just to new people, but also to hubs, influencers, strategic alliance partners who can make you visible to their audiences.
- Maybe, maybe start experimenting with social media advertising in simple ways.

Second Journey Marketing

In addition to the pieces in place from the First Stage:

- Clear decisions made about format, frequency of publishing to your audience.
- Consistently publishing to those decisions.
- Building up a library of content.

Third Journey Marketing

In addition to the pieces in place from the First Stage:

- System to set expectations of / ask for referrals from clients.

Garden Path

We begin the Garden Path in the Second Stage.

- Creating new offers that start to leverage your time/capacity.
- Paying attention to how offers sequence/lead into each other to support repeat business.

Selling

All handled in the First Stage.

Money

In addition to the pieces in place from the First Stage:

- Pay Yourself First system instituted
- Tracking/accounting systems set-up
- Accountant/bookkeeping in place.
- Merchant account to process online payments in place.
- Taxes accounted for.

Support/Systems

In addition to the pieces in place from the First Stage:

- Autoresponder to handle newsletter and email subscription automation. (Like MailChimp or Aweber)
- Project/Task management system in place.
- Information system in place.
- Beginning to experiment with outsourcing to team (e.g. web designer, virtual admin, others?)
- Beginning to learn with how to delegate.

Celebration/Appreciation, and Life Enjoyment

In addition to the pieces in place from the First Stage:

- Starting to consistently define “enough ness” in a project, and know when to stop.
- Work boundaries defined
- Rest, relaxation and fun happens on a daily, weekly and monthly basis.
- Social time with friends, family, loved ones on a weekly and monthly basis.

Momentum: The Third Stage of Development

Business Foundations

All handled in the first stage.

Website and Social Media presence

In addition to the pieces in place from the Second Stage:

- More sophisticated social media presence, if you're using it. Potentially expanding the number of channels you're present on.
- Potentially social media advertising, as part of your First Journey Marketing, integrated with your website/ online presence.
- Resources easily available on your website for clients, to make access to supplemental materials much easier.

First Journey Marketing

In addition to the pieces in place from the First Stage and Second Stage:

- Systems in place to easily deliver strategic alliance content.
- List of potential people, communities, organizations, businesses to research and contact over the next 6-12 months.

Second Journey Marketing

In addition to the pieces in place from the First Stage and Second Stage:

- One to two months (or more) of topics/ideas in reserve, or even pre-created.
- Editorial/publishing calendar scheduled, at least loosely, matching schedule of offers and promotions.

Third Journey Marketing

In addition to the pieces in place from the First Stage and Second Stage:

- System in place to wow clients with little extras/nice touches.
- List of potential referral sources to research and contact over the next 6-12 months (can overlap with First Journey.)

Garden Path

In addition to the pieces in place from the Second Stage:

- Offers are in sequence and flow.
- Offers leverage time/capacity and do not create income ceilings lower than is desired.
- Clarity of how prospects/clients move down the Garden Path.

Selling

All handled in the First Stage.

Money

In addition to the pieces in place from the First Stage and Second Stage:

- Prudent reserve being built up.
- Vacation reserve being built up.
- Investment/unexpected expenses reserve being built up.

Support/Systems

In addition to the pieces in place from the First Stage and Second Stage:

- Have just enough team in place.
- Clarity/system on how to delegate.
- Developing leadership capacity.
- Have projects/tasks in business prioritized for hand-off as revenue covers more support.
- Potentially have legal support in place for IP or other issues.

Celebration/Appreciation, and Life Enjoyment

In addition to the pieces in place from the First Stage and Second Stage:

- Fine-tuning schedule for real enjoyment, such as regular three day weekends, or other spaciousness.
- Planning for vacation time.
- Extras to add happiness to team/support staff.
- Bringing beauty and ease into your workspace.

Independence: The Fourth Stage of Development

Business Foundations

- May need to be worked to account for organizational identity, not tied to personal identity of the founder.

Website and Social Media presence

In addition to the pieces in place from the Second Stage:

- Website retooled to represent an organization and not just an individual.
- Sophisticated website systems for delivery of offers and back-end functionality for clients.
- Social media/online presence balanced between real human presence and being able to reach many more people.

First Journey Marketing

In addition to the pieces in place from the First Stage and Second Stage:

- Predictable systems and strategies to reach much larger numbers of potential new clients, with heart.

Second Journey Marketing

In addition to the pieces in place from the First Stage and Second Stage:

- Truly consistent, personal, useful content needs to be produced. May need to introduce voices other than the owner/founder.

Third Journey Marketing

In addition to the pieces in place from the First Stage and Second Stage:

- Conscious and engaged systems of supporting referrals.

Garden Path

In addition to the pieces in place from the Second Stage:

- Quality and delivery of the offer remain high, even when the owner/founder isn't the one delivering.
- Often number of offers is simplified, with clear sequencing between them.
- Individual work, when offered, mostly offered by practitioners other than the owner/founder.

- Practitioner training program may become part of what's offered.

Selling

- More sophisticated systems and processes to handle higher volume, usually removing owner/founder from the process.

Money

In addition to the pieces in place from the First Stage and Second Stage:

- Equivalent of Chief Financial Officer (CFO) is hired.
- Payroll for employees is put in place.
- Benefits for employees are put in place, as well as legal support for employment issues.
- Building in bonuses or other forms of profit/revenue sharing for the team.

Support/Systems

In addition to the pieces in place from the First Stage and Second Stage:

- Legal support in place.
- Clarity on what size team is necessary, avoiding over or under hiring.
- Decision-making systems and flow become critical.
- Clarity around organizational culture, communicating vision and values.
- Project management capacity on the team.
- Every system needs to be sophisticated, and able to be used by a team.

Celebration/Appreciation, and Life Enjoyment

In addition to the pieces in place from the First Stage and Second Stage:

- Celebration and appreciation build into workflow and company culture.
- Systems, money and support handled thoughtfully to avoid "hustle" culture and unhealthy deadlines.
- Consider alternative work schedules for the team.
- Consider team trips, retreats and other perks as the company can afford it.
- As founder/owner, make sure you are enjoying yourself, working reasonable hours, and appreciating it all.