

# THE OTHER WAY TO BUILD

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Worksheets & Templates to Help  
You Build a Business You Love  
Without Sacrificing the Life You Want



## BEFORE WE START...

This workbook is here to help you put the ideas from **The Other Way to Build** into action. Use these pages to reflect, simplify, and design a business that truly supports your life. Take your time. Come back to it anytime you need clarity or a reset. This is your permission to slow down and build something that lasts.

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THE OTHER WAY TO BUILD • SIMPLY SAVVY

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## Welcome!

I'm so glad you're here. If we were sitting together over coffee, I'd tell you to take a deep breath and go at your own pace. These pages aren't about having all the answers right away—they're about getting honest with yourself and finding what really works for you. Come back to them whenever you need. I'm right here, cheering you on.

♡ Laurie



Let's get started



# STAGE 1:

# REDEFINING SUCCESS

Slow down and get honest  
about what you really want.  
Build your foundation here.



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LET'S GET  
STARTED!

FROM CHAPTER 1

# What's Working and Not Working?

## *Redefining Success*

Before we rush ahead, let's check in. This isn't about doing it "right" or beating yourself up. It's just about noticing what's helping you...and what's not. Think of it like a quick gut-check with a friend.

### **What's Working?**

Where have things felt lighter, easier, or like, "Okay, this is actually working for me"?

### **What's Not Working?**

Where are you spinning your wheels or feeling drained? The places where you sigh and think, "Ugh, why am I even doing this?"

### **One Small Shift**

Circle one thing you'll keep, one thing you'll drop, or one thing you'll tweak. No pressure to overhaul everything—just a tiny shift that makes life feel a little better this week.

This week I'll: \_\_\_\_\_

# Five Levels of Why

## *Redefining Success*

*You can't know **how**, until you first know **why***

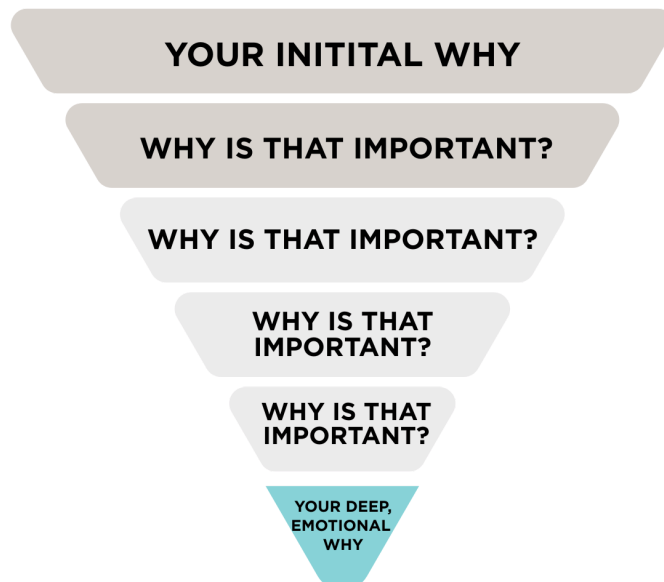
One of the simplest ways to get clarity is to ask yourself why—not just once, but five times. Each time you answer, ask “why” again. By the fifth answer, you’ll usually uncover the deeper motivation driving your business. That’s the one that will keep you going when things feel heavy.

Take your time. Be honest. There are no right or wrong answers—just your answers.

- WHY #1 (Initial Why): \_\_\_\_\_
- WHY #2: \_\_\_\_\_
- WHY #3: \_\_\_\_\_
- WHY #4: \_\_\_\_\_
- WHY #5: \_\_\_\_\_

Anchor WHY:

When things get hard, I remind myself that I’m building this because...



FROM CHAPTER 2

# Your Vision of Success

## Redefining Success

Before you build anything else, take a moment to get really honest about what success actually means to you. Not what you “should” want, or what everyone else is chasing—but what would genuinely feel good and right in your life. Don’t overthink it. Just write what comes up.

### Describe Your Ideal Day

Think about how you want your day to flow, not just what sounds impressive.

### What Actually Matters Most?

List the non-negotiable priorities that matter more than anything.

### What do you want more of in your life and work? What needs less space?

- I want more:
- I want less:

### Financial Reality Check

Get honest about what “financial success” looks like:

- What amount feels safe/enough/exciting:
- Giving or saving goals:

### How I Want to Feel Each Day

Describe how you want to feel each day waking up, going to bed. Feel it.

**Reflect:** Are the things you just wrote down actually showing up in your life right now? (Circle where you are now).



*Remember:* There are no wrong answers. Be honest with yourself—it’s the best place to start.



FROM CHAPTER 3

# Foundation Planner

## Redefining Success

What matters most to you in how you live life and do business?  
Values help you guide your decisions and interactions.

### Figure Out Your Core Values

*Circle, highlight, or mark the words that feel most important to you. Add any of your own at the end.*

Accountability, Achievement, Adaptability, Adventure, Altruism, Ambition, Authenticity, Balance, Beauty, Being the best, Belonging, Career, Caring, Collaboration, Commitment, Community, Compassion, Competence, Confidence, Connection, Contentment, Contribution, Cooperation, Courage, Creativity, Curiosity, Dignity, Diversity, Efficiency, Empathy, Empowerment, Environment, Equality, Ethics, Excellence, Fairness, Faith, Family, Financial stability, Forgiveness, Freedom, Friendship, Fun, Future generations, Generosity, Giving back, Grace, Gratitude, Growth, Harmony, Health, Home, Honesty, Hope, Humility, Humor, Inclusion, Inclusivity, Independence, Initiative, Innovation, Integrity, Intuition, Job security, Joy, Justice, Kindness, Knowledge, Leadership, Learning, Legacy, Leisure, Love, Loyalty, Making a difference, Nature, Openness, Optimism, Order, Parenting, Passion, Patience, Patriotism, Peace, Peace of mind, Perseverance, Personal fulfillment, Power, Pride, Recognition, Reliability, Resourcefulness, Respect, Responsibility, Resilience, Risk-taking, Safety, Security, Self-discipline, Self-expression, Self-respect, Serenity, Service, Simplicity, Spirituality, Sportsmanship, Stewardship, Success, Teamwork, Time, Tradition, Travel, Trust, Truth, Understanding, Uniqueness, Usefulness, Vision, Vulnerability, Wealth, Well-being, Wisdom, Write your own: \_\_\_\_\_

### Define Your Core Values

Narrow down the words above to your top three. Note: that some of them may naturally fit under a specific theme.

- Value 1: \_\_\_\_\_
- Value 2: \_\_\_\_\_
- Value 3: \_\_\_\_\_
- Are these values actually showing up in your life and/or business? How?
  
- Which value needs more attention right now? \_\_\_\_\_



FROM CHAPTER 3

# Foundation Planner

## Redefining Success

Before you try to market or sell anything, you need a solid foundation. This section helps you clarify what you stand for and how you want your business to support your real life. Don't rush it—be honest

### Create Your Success Statement

Paint me a picture of what that actually looks like in practice. Walk through a specific day where your values are front and center—what are you doing, who are you with, how does it feel?

*Use this sentence to define success in your own words.*

Because my values are \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_, I want to do more \_\_\_\_\_ and less \_\_\_\_\_.

### Ditch the Scoreboard

*Check in with yourself so you can track what's important. Ask yourself:*

- Am I spending time with who matters most? What may need to change?  
\_\_\_\_\_
- Is my work fulfilling? What may need to change?  
\_\_\_\_\_
- Do my decisions reflect my values? What may need to change?  
\_\_\_\_\_





FROM CHAPTER 3

# Foundation Planner (continued)

## Redefining Success

### The Time Reality Check

*After you've tracked your time for 1 week, answer the following:*

How much time was spent on what matters most to you?

How much time was necessary "life stuff"?

How much time was spent on things that don't really need your attention?

What was your biggest "ah-ha"? What would you like to adjust this week?

### Understand How You're Wired

*There are a number of free DISC assessments (one of my favorites is on [truity.com](http://truity.com)). Take the assessment and then answer the following questions:*

My DISC type is:

*Consider how your style affects your business.*

- Based on my DISC style, that means I tend to be: \_\_\_\_\_  
\_\_\_\_\_
- These business model/s would be a good fit for me: \_\_\_\_\_  
\_\_\_\_\_
- I prefer to communicate: \_\_\_\_\_
- What support would be helpful for me: \_\_\_\_\_
- I should be aware: \_\_\_\_\_



FROM CHAPTER 3

# Foundation Planner (continued)

## Redefining Success

### What You're Already Good At - Strengths Inventory

*Acknowledge what you bring to the table.*

- *What comes naturally to me:* \_\_\_\_\_
- *What do people come to me/thank me for?* \_\_\_\_\_
- *What energizes me:* \_\_\_\_\_
- *My top 3–5 strengths:* \_\_\_\_\_

### Your Story Matters More Than You Think

The things you've experienced and lived through are the backbone of your story. They're part of what makes you, you!

**What are 2-3 defining moments that have shaped who you are today?**

**What did those experiences teach you, about yourself, about others, about life or faith, that you want to pass on to someone else?**

**NEED MORE SPACE?** Use this space to write your story however you want—narrative, bullet points, memories. This is for you.

# Foundation Planner (cont'd)

## Redefining Success

### Finding Your Sweet Spot

#### 1. YOUR STRENGTHS

• What are your strengths, skills, natural talents?

#### 2. YOUR VALUES?

What matters most to you? Who or what do you love supporting or helping with?

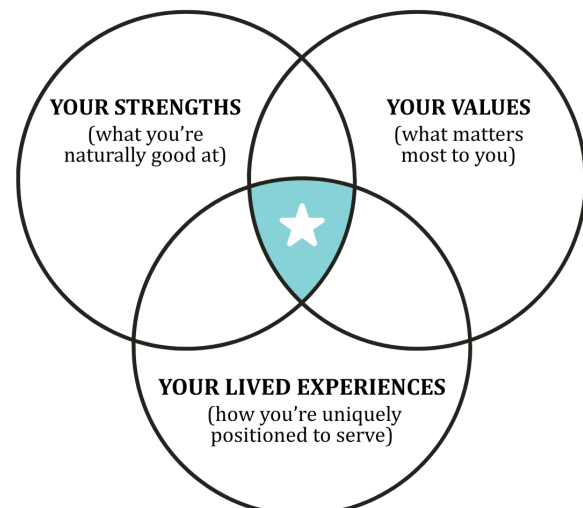
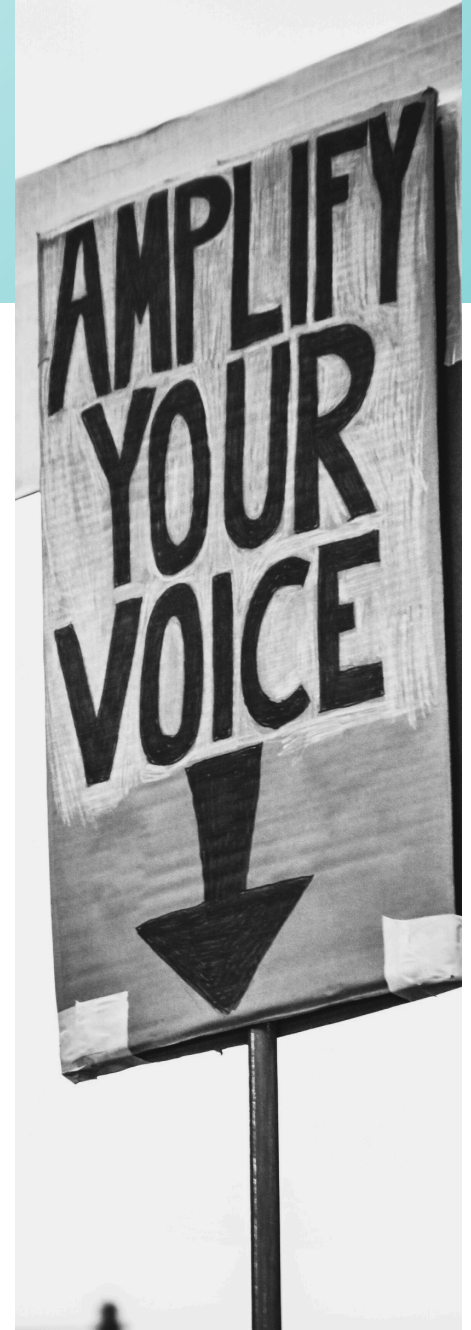
#### 3. YOUR EXPERIENCES

Problems you can help solve? What will they pay for?



#### SWEET SPOT

That middle spot in the diagram? That's your sweet spot. It's the kind of work that lights you up, uses your gifts, and genuinely helps others. More often than not, it's where you'll find the clearest direction for your business, your message, or your next offer.



## SECTION 2:

# FOCUS ON WHAT MATTERS

Clear the clutter and focus on serving your people with what truly matters.



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# Audience Clarity Worksheet

Find your people.

You can't serve everyone. The clearer you get about who you're here to help, the easier it is for them to find you—and for you to serve them well.

1

**Who Are Your People?** Describe the people you feel most called to serve.

- Who do I want to help? What season of life or business are they in? What are their biggest struggles? What do they want more of? Less of?

2

**What makes you uniquely equipped to help?** Why you're the right person to help?

- What in my story helps me understand them? What challenges have I faced that help me relate? What strengths or experiences do I bring?

3

**Who do you NOT want to work with?** It's okay to be honest about it.

- Who drains your energy? What attitudes or patterns do I want to avoid? Who is not a good fit?

4

**Where do your gifts and their needs meet?**

- What problems can you help solve? What kind of transformation can you lead? Where can you make a real difference?

**Your Clarity Statement** Bring it all together in one simple sentence.

I help [AUDIENCE] go from [PROBLEM] to [RESULT] through [OFFER].

Now you write yours:



FROM CHAPTER 5

# Simplicity Action Plan

*Why less really can lead to more.*

It's easy to overcommit and end up scattered. This page helps you get honest about what's essential—and gives you a plan to move forward with more focus and less noise.

## AUDIT YOUR CURRENT COMMITMENTS

List everything you're saying "yes" to right now—personally and professionally.

- Projects I'm working on:
  
  
  
  
  
  
  
  
  
  
- Responsibilities I've taken on:
  
  
  
  
  
  
  
  
  
  
- Goals on my mind:

## MY ESSENTIAL THREE

What matters most in this season?  
Choose only three things to focus on.

- 1
- 2
- 3

## PRACTICE THE PAUSE

Before saying yes to something new, ask yourself:

What do I need to say no to for this yes?

Is this aligned with my values and goals right now?

Will this make things simpler or more complicated?

Do I sense God leading me in this direction?

## ONE SIMPLE NEXT STEP

What's one small thing I can do today to move forward with clarity?

*Remember:* Simplifying isn't about doing less—it's about doing what matters most.



# Easy-Yes Offer Builder

A simple, clear offer makes it easy for the right people to say “yes.” Use this page to cut through the noise and outline an offer that feels like a no-brainer to your audience.

Remember: confused people don't buy. Keep it simple, clear, and focused.

**Offer One-Liner (how you'd explain it to a friend):**

**Who It's For:**

**Who It's NOT For:**

**Transformation (Before → After):**

**What's Included:**

**Simple Call-to-Action (what's the next step?):**

**Confusion Audit:**

- Do I have more than one CTA?  Yes  No
- Am I giving too many options?  Yes  No

# SECTION 3:

# **SERVE & SELL**

Discover your unique approach and confidently stand out to attract clients.



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FROM CHAPTER 7

# 90-Day Marketing Focus

*One Platform, One Message*

**CHOSEN PLATFORM (PICK ONE):**

**ONE ACTION THIS WEEK:**

**Core Message** is the big idea you want your audience to keep hearing from you over and over. It's the thing you want them to instantly connect with you about.

What's your core message?

**90-Day Check-In:** At the end of your 90 days, pause and look back. The goal isn't perfection – it's progress and learning. Use these questions to celebrate what's working and reset what isn't.

**What worked well?**

**What didn't?**

**What will I adjust for the next 90 days?**

**My Plan**

- How often will I show up? (ex: 2 reels + 1 carousel post each week, 1 weekly live, 3 emails a month)
- What type of content will I focus on? (ex: tips, stories, behind-the-scenes, client wins, invitations to my offer)
- What's realistic for this season? (Don't overcommit – choose what you can stick with for three months.)



FROM CHAPTER 8

How will people find me?  
How will they know what I offer?  
How will they buy or book easily?  
How will I follow up?

# Systems Blueprint

*Simple tools to support your life and business.*

*You don't need fancy tools—just systems that work for you. Use this page to plan simple, sustainable systems.*

## TIME SYSTEM

**How you plan and structure your time.**

- My peak energy times are:
- My non-negotiable time blocks (for family, rest, leisure, worship) are:
- What hours will I work:
- What boundaries do I need to set?

## COMMUNICATION SYSTEM

**How you keep in touch—with your audience, clients, and team.**

- I will check email (be as specific as possible):
- My response time commitment is (make sure it's realistic):
- One communication boundary I need to set:

## MONEY SYSTEM

**How you get paid and track finances.**

- How I currently accept payments:
- How I track income/expenses:
- One area to clean up or simplify:

## MARKETING & CLIENT FLOW SYSTEM

**How you attract, nurture, and serve clients.**

- How am I'm currently bringing in new leads?
- How will they know what I offer?
- Can they buy/book easily?
- How do I follow up and serve them:
- One area I want to improve or simplify:

## ONE SIMPLE NEXT STEP

What's one small action I can take this week to improve my systems?

*Remember* : Small steps count.  
The goal is progress,  
not perfection.



FROM CHAPTER 8

# The 5-Minute Tech Checklist

*Tackle the tech—without the overwhelm.*

You don't need to be "tech-savvy" to grow your business—you just need a system that works for you. This checklist covers the essential tech to help you attract, nurture, and serve clients online.

## THE BASICS (YOUR FOUNDATION)

- Custom domain
- Business email address (Namecheap, Google domains)
- Payment processor (e.g. Stripe, PayPal)
- Calendar/scheduling tool (e.g. Calendly, TidyCal)

## GROW YOUR LIST (ATTRACT LEADS)

- Lead magnet or freebie (Systeme.io, Canva)
- Email service provider (e.g. Systeme.io, Kit, Flodesk)
- Opt-in form or landing page (Systeme.io, Thrivecart, GHL etc)

## NURTURE & SELL (BUILD RELATIONSHIPS + MAKE OFFERS)

- Automated welcome or nurture sequence (e.g. Systeme.io, Kit, Flodesk etc.)
- Simple sales page or offer link (Systeme.io, ThriveCart, Stan Store etc.)
- Way to deliver your offer (Google Drive, Systeme.io, Teachable etc.)

## NICE TO HAVE LATER (NOT URGENT)

- CRM or client tracker
- Automated workflows
- Advanced analytics or integrations

*Note:* Check off what you already have in place. Star or circle the next tool you want to set up. I've added a few free and low cost ideas to get started.

# Values-Aligned Sales Planner

Selling doesn't have to feel gross or pushy. This worksheet will help you reframe sales as service so you can show up confidently and authentically.

## Shift Your Mindset

What thoughts or feelings come up when you think about selling right now? Write freely—be honest.

**Reframe:** How might that change if you viewed selling as helping someone who's already searching for what you offer?

## Know Their Struggles

List the top 3 struggles your ideal client is facing right now.

|  |  |  |
|--|--|--|
|  |  |  |
|--|--|--|

## What are they Googling at 2am?

|  |
|--|
|  |
|--|

## Your Transformation Story

What problem have you solved that mirrors what your people are facing? What was your "before"? What was the turning point? What does life look like now?

|  |
|--|
|  |
|--|

## Give Value First

What's one small piece of value you could share for free this week?

|  |
|--|
|  |
|--|

*note:* Selling isn't pressure—it's service. When you lead with care, the right people say yes.



# Client Transformation Story

Stories are one of the most powerful ways to connect with potential clients. Instead of selling with hype, you can simply share how someone's life or business changed after working with you. Use this page to capture one story of transformation. Later, you can repurpose it for conversations, posts, or even your sales page.

**Client (first name or initials):** \_\_\_\_\_

**Before (what life/business looked like):**

- What were they struggling with?
- What frustrations, fears, or pain points did they have?

**Turning Point (the moment of change):**

- What helped them shift?
- What was the "aha" or the step they took with your help?

**After (the transformation):**

- What results did they see?
- How do they feel now compared to before?

**Permission Note:** Always get your client's OK before sharing details publicly. Sometimes even a general "someone I worked with..." story is powerful enough.

*Note:* Don't overcomplicate this. You don't need 10 stories — even one clear before-and-after is enough to show someone what's possible.

# Boundaries Blueprint

Vague boundaries don't work. If you can't say exactly where the line is, no one will know when they've crossed it. Get clear. Specific. Unmistakable.

**When you don't protect what matters most, you end up giving your best energy to what matters less.**

*Think about what you truly don't want to compromise on. These are your non-negotiables.*

**Family time** - What does quality time look like for you? What would you regret missing out on? \_\_\_\_\_

**Spiritual life** - How do you stay connected to your faith? What rhythms do you need to protect? \_\_\_\_\_

**Health/rest** - What physical, mental, or emotional care is essential for you? \_\_\_\_\_


**Personal growth** - How do you keep learning and growing? What time or space do you need for that? \_\_\_\_\_

**Other** - Anything else that is truly non-negotiable? \_\_\_\_\_

## What Drains You vs. What Fills You

*Not all activities are created equal.*

 These Drain My Energy:

 These Fills My Energy Tank:

## Define Your Specific Boundaries

Vague boundaries don't work. Be clear. Ex: Instead of "I want better balance" → "I don't check email after 6 PM."

Boundary 1: \_\_\_\_\_

Boundary 2: \_\_\_\_\_

Boundary 3: \_\_\_\_\_

## Create Space for What Matters

*Check the box if this is something you struggle with or want to improve*

### Relational Margin

- I limit draining relationships
- I prioritize time with life-giving people
- I don't say yes out of guilt

### Spiritual Margin

- I schedule regular quiet/prayer time
- I protect Sabbath or rest days
- I make space to listen to God's voice

### Physical Margin

- I avoid overcommitting
- I protect time for rest or movement
- I leave space for sleep and recovery

### Mental Margin

- I limit information overload
- I give myself time to think and reflect
- I avoid constant multitasking

### Work Margin

- I leave time for deep work
- I avoid overbooking meetings
- I set clear work hours and unplug



**YOUR ENERGY IS  
PRECIOUS. YOUR  
PEACE IS ESSENTIAL.  
PROTECTING THEM  
ISN'T OPTIONAL IF  
YOU WANT TO BUILD  
SOMETHING THAT  
LASTS.**

# SECTION 4:

# **BUILD WHAT LASTS**

Take intentional action with clarity and courage to grow your business.



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FROM CHAPTER 11-12

# Sustainable Growth & Season Reflections

*Find Your Rhythm*

*Take a moment to breathe and think about how you can create space in your life and work. Small changes make a big difference.*

**1. WHAT SEASON AM I IN RIGHT NOW?**

(Growth / Maintenance / Rest)

**2. WHAT DAILY OR WEEKLY RHYTHMS CAN SUPPORT ME?**


(ex: writing 30 mins on Tues/Thurs, no phone at dinner)

**3. WHAT SIGNS TELL ME I'M PUSHING TOO HARD OR GETTING OFF TRACK?**

**4. WHAT IS ONE WAY I CAN RENEW OR REST THIS WEEK?**

(ex: take a walk, read for fun, spend time with loved ones)

**5. WHAT'S ONE SMALL ACTION I CAN DO TODAY TO KEEP STEADY PROGRESS?**

*Note:*  Hey friend, progress doesn't have to be perfect or fast. You're doing awesome just by showing up and taking small steps. Keep going—you've got this, one little win at a time!



FROM CHAPTER 13

# You've Got This

**Your story matters. Your next step awaits.**

Take a moment here to celebrate how far you've come and decide your next small step forward. Remember – progress is progress, no matter how small.

**1. What part of your story has brought you strength or insight you can use right now?**

**2. What is one thing you can celebrate about your growth so far?**

**3. What is one next step you feel ready to take? (It doesn't have to be big – just something doable.)**

**4. What might get in your way, and how can you remind yourself to keep going?**

**5. Who can you reach out to for encouragement or accountability?**

**6. How will you celebrate progress along the way?**

*Let's finish strong!* 

# Legacy Reflection: Write Your Obituary

This isn't about being morbid—it's about zooming out and naming the kind of life you want to be remembered for. Writing your obituary is a powerful way to get clarity on what matters most and how you want your story told.

Imagine it's years from now, and someone is standing up to share your story. What do you hope they'll say about you—who you were, how you lived, and the impact you left?

## Prompts to Guide You

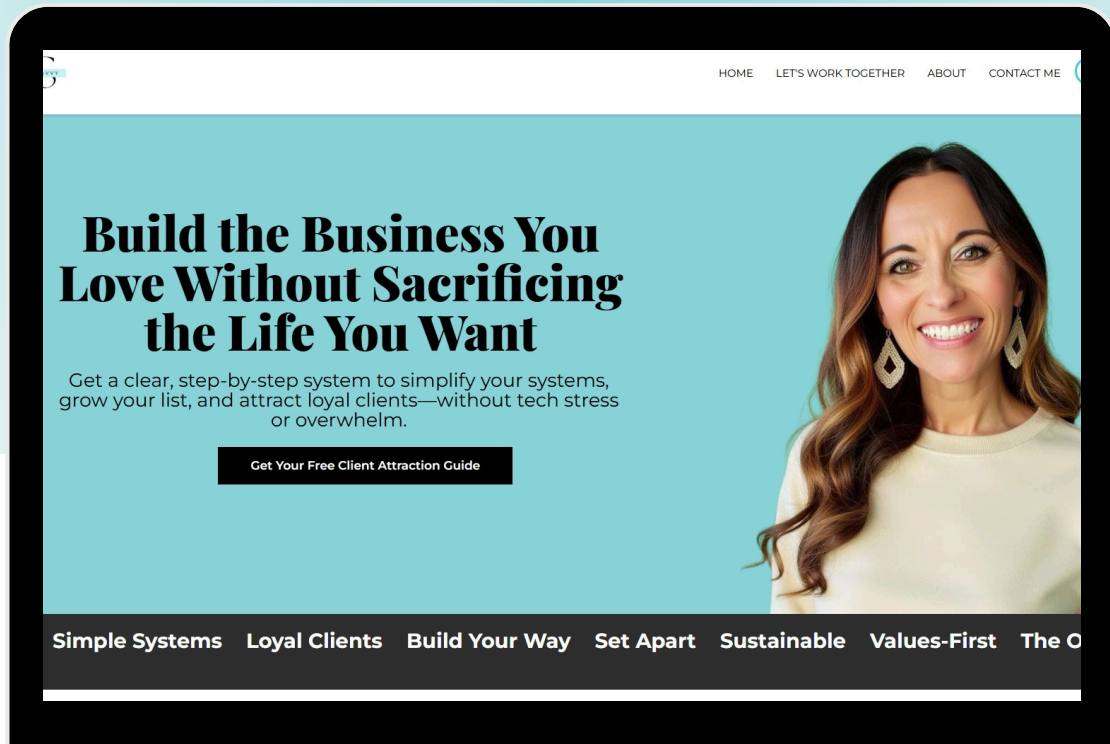
- Who mattered most to me, and how did I show up for them?
- What kind of person was I known as? (kind, strong, generous, creative, faithful...)
- What impact did my work or business have on others?
- What did I value most, and how did it show in my daily life?
- What stories or moments do I hope people remember?

## Now, Write Your Obituary

Take a deep breath and write it out. Don't worry about getting it "perfect." Just write from the heart.

**Reflection Question:** After writing, ask yourself—am I building a life and business today that will make this obituary true? If not, what's one shift I can start making now?

# FOR THE NEXT STEP IN YOUR JOURNEY



## SUPPORT MAKES ALL THE DIFFERENCE.

At the end of the day, you're not just building a business.  
You're building a life that matters—one intentional step at a time.

Want to see if your business is really supporting the life you want (or secretly draining it)? **The Sustainable Business Scorecard** is a quick "health check" that shows where you're at and gives you a simple next step to stay on the path to freedom instead of burnout..

 Take the quick quiz now at [www.simplysavvy.co/quiz](https://www.simplysavvy.co/quiz)



# THANK YOU

**Thanks for spending this time with me.** I don't take your investment—of time, energy, or money lightly. Truly. It means so much that you'd trust me to sit alongside you in these pages and in this work.

I'm honored to be a small part of your journey as you choose to build your business the other way: a simpler, steadier way forward that actually fits your life, your values, and your calling.

My hope is that as you've worked through this workbook, you've found space to breathe, to think honestly about what you want to create, and to believe that you really can do this—without the hustle that drains you or the pressure to prove yourself.

Because you're not just building a business. You're building a life that matters, one meaningful, intentional step at a time.

♡ Laurie