

FOR SMALL BUSINESS OWNERS



STEERING YOUR STRATEGY.

A PRACTICAL GUIDE TO GROW YOU, GROW YOUR TEAM, GROW A SMALL BUSINESS.

TEMPLATES &
ACTIONS
GALORE.



LET'S GET INTO IT.

Sometimes running a small business can be like juggling a dozen different hats with a chainsaw, that's on fire!

You might be wondering why on earth you should add strategy to your already jam-packed to-do list?

After all, you're constantly juggling multiple tasks, from managing your team to keeping the cash flow steady and ensuring your customers are delighted.

It's a whirlwind of action that leaves little room for slowing down, let alone thinking about long-term strategies, right?

Well, you're not alone in questioning the value of strategic planning.

We get it.

But what if we told you that strategy isn't just another time-consuming chore, but rather the key to realising your business's full potential and securing its future?

Let's break it down in a way that fits seamlessly into your growth journey, without adding unnecessary complexity or jargon.

And address the "why", then tackle the "how."

And the big one! Strategy is as much about what you don't do or stop doing, as much you what you need to start doing!

Grab your favourite beverage, find a comfy chair, and let's dive in.

Troy, Mick, Rob and AJ

Grow A Small Business.

5 common pain points that relate to strategy: how many resonate with you?

1

I keep getting distracted with bright shiny objects.

2

Not doing the right things.

3

As my business grows, I struggle to retain people.

4

I struggle to get my team motivated.

5

I don't have time for strategy, I just need to get shit done.

Check out this table: it will help you summarise and give you time to think about how to organise common pain points.

Challenge	Recommendation	Actions
Growing Your Business	<ul style="list-style-type: none"> • Develop a strategy that identifies your target market for clarity and focus. • Stick to your game plan (strategy and priorities). 	<ul style="list-style-type: none"> • Define your target market. • Create and follow a strategic plan. • Read "Atomic Habits" for professional development.
Knowing the Right Things to Do	<ul style="list-style-type: none"> • Define 1 to 3 objectives for the next twelve months, aligned with your vision. • Focus on these objectives as the "right" things to do. 	<ul style="list-style-type: none"> • Set 1 to 3 objectives aligned with your vision. • Prioritise and focus on these objectives.
Retaining Team Members as Your Business Grows	<ul style="list-style-type: none"> • Provide support, training, and coaching to team members promoted to managerial roles. • Avoid allowing them to manage only at their comfort level. • Implement an onboarding process for managers. 	<ul style="list-style-type: none"> • Establish an onboarding process for managers.
Motivating Your Team	<ul style="list-style-type: none"> • Develop a clear strategy and communicate it to your team. • Involve your team in executing the strategy, to boost motivation. 	<ul style="list-style-type: none"> • Communicate the strategy to your team effectively and often.
Lack of Time for Strategy	<ul style="list-style-type: none"> • Understand that strategy is crucial for achieving your vision and goals. • Focus on three key elements: <ol style="list-style-type: none"> 1. Unique value for customers they cannot get from anywhere else, and what your customer wants. 2. Delivery - How you deliver the promised value. 3. Branding - How you communicate value well. 	<ul style="list-style-type: none"> • Recognise the importance of strategy. • Develop a plan for each element and align it with your vision and goals.



Grow A Small Business Story: Brewing success and a café owners journey to a winning strategy.



In the bustling world of small businesses, café owners often find themselves in the thick of it, and grappling with countless daily challenges. Among these challenges, formulating a strategic plan can often fall to the wayside, leaving businesses in a state of perpetual ad-hoc decision-making.

Let's explore how café owner Alice recognised the importance of having a well-defined strategy for her business, and the transformation it brought to their growth.

Obstacles and Challenges

Alice is a passionate café owner with a thriving local business. However, like many small business owners, she found herself entangled in the day-to-day operations, leaving little time for long-term strategic planning.

The challenges she faced included:

- (1) Time Constraints:** Juggling between managing staff, inventory, and customer service left Alice with little time to focus on strategy.
- (2) Lack of Clarity:** Alice was unsure about what direction her café should take to achieve her long-term goals and vision.
- (3) Competitive Pressure:** The competitive landscape in her area was intensifying, and she needed a way to stand out.

Action Taken

Realising the importance of a clear and actionable strategy, Alice decided to take steps to overcome these challenges. She:

- (1) Delegated Operational Tasks:** Alice delegated some daily operational tasks to trusted staff members, freeing up her time to concentrate on strategic planning.
- (2) Set Clear Objectives:** She defined specific objectives for her cafe's growth over the next 12 months, closely aligned with her vision of creating a community-focused, and environment conscious café.



(3) Focused on Differentiation: Alice identified her cafe's unique value proposition, emphasising artisanal, locally sourced ingredients and eco-friendly practices.

Results and Benefits

The actions taken by Alice to prioritise strategic planning yielded remarkable results:

(1) Increased Efficiency: Delegating operational tasks not only freed up Alice's time but also improved the overall efficiency of her café.

(2) Clearer Direction: Setting clear objectives provided Alice with a roadmap, allowing her to make informed decisions aligned with her long-term vision.

(3) Competitive Edge: Alice's focus on her café's unique value proposition helped it stand out in a crowded market, increase their prices and attract environmentally conscious and quality-seeking customers.

Summary Conclusion

The journey of Alice, our café owner, underscores the importance of crafting a well-defined strategy for small businesses. By prioritising strategic planning and aligning it with her goals and vision, Alice not only overcame time constraints but also positioned her café for growth and success.

A tool to help you get started with strategic thinking and planning using a café as an example.



SWOT Analysis Template

The primary goal of the SWOT analysis is to identify and evaluate the internal strengths and weaknesses of a business, along with the external opportunities and threats it faces.

The acronym "SWOT" stands for:

Strengths:

- Internal factors that give the business a competitive advantage.

Weaknesses:

- Internal factors that place the business at a disadvantage.

Opportunities:

- External factors that the business could exploit to its advantage.

Threats:

- External factors that could negatively impact the business.

A tool to help you get started with strategic thinking and planning using a café as an example.



SWOT Analysis Template

STRENGTHS

- Experienced baristas
- Cozy ambiance
- Unique specialty coffees

WEAKNESS

- Limited seating space
- Reliance on local suppliers
- Limited marketing budget

OPPORTUNITIES

- Growing trend in coffee consumption
- Nearby office complex opening soon
- Increasing demand for organic products

THREATS

- Strong competition from established cafés
- Fluctuating coffee bean prices
- Changing consumer preferences

A tool to help you get started with strategic thinking and planning using a café as an example.



Strategic Action Plan Template

This template outlines specific actions and initiatives to be taken to achieve strategic objectives.

How to Use: Develop a table or list that includes the strategic objectives, key performance indicators (KPIs) to measure success, responsible team members, deadlines, and resources required for each action.

This tool helps in breaking down the larger strategy into actionable steps, making it easier to track progress and stay focused.

Strategic Objectives	Key Performance Indicators (KPIs)	Owner	Deadline	Resources Required
Introduce New Specialty Coffee	Number of New Coffee Sales	Josh	60 Days	Marketing budget, staff training
Expand Seating Space	Increased Customer Satisfaction	Maggie	180 Days	Renovation budget, interior designer
Develop Online Presence	Online Orders and Engagement	Alice	120 Days	Website development, social media management

A tool to help you get started on your strategy to improve retention.



Start an onboarding process*

✓ 2 weeks before start: Setup

- Ensure all employment paperwork is signed and filed
- Organise the new hires' access to be setup before day one
- Send the new hire a welcome pack and any information they can consume about the business and their role before they start
- Book in a pre-boarding with meeting the the new hire and the rest of the team, for next week
- Book in the day one coffee / lunch meetings with the owner and the new hires' team

✓ 1 week before start: Pre-boarding

- Draft onboarding sprint plan and email to the new hire (to their personal email); at least two business days before the pre-boarding meeting
- Hold a pre-boarding meeting with the new hire
- Agenda:
 - Run through the Job Description
 - Answer any questions so far
 - Introduce each team member, then they outline:
 - Their time with the business
 - What they do
 - The thing they love most about working here
 - Some non-work details (eg. families, holidays, hobbies)

- Send invites (to their work email), for:
 - 13 weeks of onboarding meetings
 - Weekly one-on-one
 - Weekly team meeting
- Send a thoughtful welcome gift to their home and personal note from the team

Day 1: First impression

- ✓ • Conduct orientation
- The hiring manager and business owner has a coffee with the new hire
- Agenda:
 - Vision
 - Core Values
 - BHAGs
- Coffee or lunch with the new hire and their team

Week 1: Understand

- ✓ • 1 hour Onboarding to support their understanding
- Agenda:
 - Core Value A, the three behaviours and one story
 - Questions about the three month onboarding sprint plan
 - What's up
 - Status update
 - Where are you stuck
 - Review last weeks progress
 - Review sprint plan
 - Priorities for the next week

*'Onboarded, How to bring new hires to the point where they are effective, faster'
Author: Brad Giles 2022

[CLICK HERE
TO GROW
WITH EASE!](#)

Business Transformation Program

Why would you wait any longer to start living the lifestyle you signed up for?

A tool to help you get started on your business strategy.



Complete a Lean Canvas

Developing a robust business strategy is akin to navigating uncharted waters. Small business owners, often faced with limited resources and fierce competition, need a compass that is both agile and effective.

Enter the Lean Canvas - a strategic tool tailored for the nimble business owner.

Derived from the principles of Lean Startup methodology, the Lean Canvas is a concise framework designed to distill your business strategy into a single, actionable page.

Gone are the days of cumbersome business plans, the Lean Canvas thrives on simplicity, focusing your attention on the fundamental building blocks that define your business.

Strategic simplicity in a complex world.

PROBLEM List your customers top 3 problems	SOLUTION Outline possible solution for each problem	UNIQUE VALUE PROPOSITION Single, clear, compelling that turns an unaware visitor into an interested prospect	UNFAIR ADVANTAGE Something that can't be easily copied or bought	CUSTOMER SEGMENTS List your target customers and users
EXISTING ALTERNATIVES List how these problems are solved today	KEY METRICS List key numbers telling how your business is doing today	HIGH LEVEL CONCEPT List your X for Y analogy (e.g. YouTube = Flickr for videos)	CHANNELS List your path to customers	EARLY ADOPTERS List characteristics of your ideal customer
COST STRUCTURE List your fixed and variable costs		REVENUE STREAMS List your sources of revenue		

LEAN CANVAS

Actions you can take if you are ready to start, or it's time to review your small business strategy:

Begin with your long-term vision and define what your purpose is.

1

Conduct a SWOT Analysis:

- Identify and list internal strengths and weaknesses, such as unique capabilities, resources, and operational challenges.
- Identify external opportunities and threats, such as market trends, competition, and economic factors.
- Use the SWOT analysis to inform and guide strategic decisions by leveraging strengths, addressing weaknesses, capitalising on opportunities, and mitigating threats.

“ **A plan without actions is a dream, actions without a plan is a nightmare.** ”

Actions you can take if you are ready to start, or it's time to review your small business strategy:

Begin with your long-term vision and define what your purpose is.

2

Define Clear Objectives and Goals:

- Establish specific, measurable, achievable, relevant, and time-bound (SMART) objectives. For example, setting a goal to increase revenue by a certain percentage within the next year.
- Align objectives with the overall mission and vision of the business.
- Prioritise objectives based on their importance to the business' success and strategic focus.

“ When there is time, there is no money... And when there is money, there is no time... So, if you don't want to have regrets in this life, do it when you have either of them, don't wait for both!

— Yulia Lipovka

[CLICK
HERE TO
BOOK A
CHAT!](#)

Growth Chat

Do you feel confident about growing your small business? Book a Growth Chat for personalised advice on your biggest or scariest challenge.

Actions you can take if you are ready to start, or it's time to review your small business strategy:

Begin with your long-term vision and define what your purpose is.

3

Engage Your Team:

- Involving your team ensures diverse perspectives, enhances collaboration and increases the likelihood of a successful plan and implementation.
- Assemble a team that brings together individuals with diverse skills and expertise, such as finance, marketing, operations, and customer service.
- Foster open communication and collaboration among team members to ensure a well-rounded strategic plan.

“**Start right now with whatever you have. Six months from now it will be an absolute game changing move of your life.**

— Hiral Nagda

Resources we recommend for professional development and to steer your strategy.



“As an avid believer in continuous learning and improvement, I find myself revisiting 'The E-Myth' every year without fail. This timeless classic offers profound insights into the common pitfalls and challenges faced by small business owners. Its powerful message about the importance of working 'on' your business rather than 'in' it resonates deeply with me.” - Troy Trewin



“Year after year, I find myself drawn back to this book. This work explores the transformative journey of companies that transition from merely good to truly great – a quest that resonates deeply with my own aspirations for business excellence.” - Rob Cameron



*"No Bullsh*t Strategy by Alex M H Smith dismantles the convoluted jargon of traditional business strategy, offering a refreshing approach that is clear, simple, and immediately actionable. Ideal for all, this book demystifies strategy, making it both insightful and enjoyable, providing a transformative perspective on your business.” - Michael Denehey*



Quick Fire Friday Podcast with Special Guest Alex Smith: Empowering Small Business Growth – In-Depth Strategy Secrets with the founder of Basic Arts. Learn from Alex an expert on Contrarian Value, Competitive Leverage, and Crafting Motivational Strategies for Success.





Don't have a Strategy? The Dangers of Ad-Hoc Decision Making.

- **Reactive Over Proactive:**

- Ad-hoc decision making often results from reacting to immediate challenges rather than proactively planning for the future. This can lead to a constant firefighting mode, leaving little room for strategic growth.

- **Stifled Innovation:**

- In the rush to address urgent matters, small business owners may neglect the exploration of innovative ideas. Ad-hoc decision making can create a tunnel vision that stifles creativity and limits the potential for business evolution.

- **Lack of Consistency:**

- Consistency is the bedrock of a successful business. Ad-hoc decisions can introduce inconsistency in processes, messaging, and customer experiences - potentially damaging the brand and customer trust.

“ The secret to success is constancy of purpose.

— Benjamin Disraeli



Getting into the Right Mindset.

Strategic Planning:

- Allocate dedicated time for strategic planning. Set aside regular intervals to assess your business' strengths, weaknesses, opportunities, and threats. Develop a roadmap that aligns with your long-term vision.

• Delegating Responsibilities:

- Empower your team to take ownership of specific tasks and decisions. Delegating responsibilities not only lightens your load, but also fosters a culture of accountability and innovation within your business.

Investing in Professional Development:

- Take time to invest in your own professional development. Attend workshops, courses, conferences, or networking events that can broaden your perspective and provide insights into effective strategies.

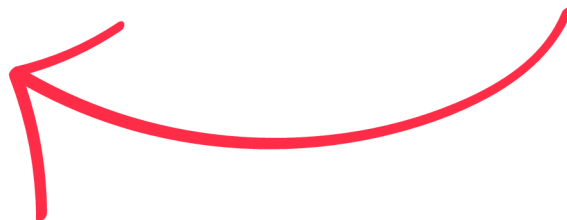
Technology Adoption:

- Leverage technology to streamline routine tasks and gain valuable insights. Implementing the right tools can free up your time, allowing you to focus on high-level decision-making and strategic planning.



Bonus Video:

What is behind your mindset that is creating the success in your business and life? (or sabotaging it). **Hit the button.**





Are you feeling confident?

The ad-hoc decision-making mode might offer short-term relief, but it's a risky strategy for sustained growth.

Small business owners must shift their mindset from constantly being in the trenches to spending intentional time on the business.

By embracing strategic planning, delegating responsibilities, investing in professional development, and adopting technology, you can break free from the ad-hoc trap.

It's time to build a business with confidence.

And if you are not feeling confident about growing your small business . . .

Book a FREE 20 minute Growth Chat!

- Personalised advice on your biggest or scariest challenge
- Actionable steps, because we are all about simple, focus and action
- Expert insights from the founder of Grow A Small Business, Troy Trewin

OK, are you ready to take your first action towards business growth?

**YES! I WANT
TO BOOK**

Business Resources from the Grow A Small Business Team:

We understand the unique challenges faced by small business owners like you, and we're here to equip you with the knowledge and tools you need to thrive and grow your small business with ease.



Resources: We write about marketing, strategy, people, systems and funding

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FREE 20 minute Growth Chat

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Weekly Leadership Email

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The 'Business Transformation Program'

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