NAFHAC

BUSINESS BUILDER BLUEPRINT

YOUR ROADMAP. YOUR RESOURCES. YOUR RESULTS.

LEARN

IMPLEMENT

GROW

Ownership, Use, and Important Notes

A practical education resource created for business owners and real estate professionals

The Business Builder Blueprint is a NAFHAC educational resource developed from Premium Elite coaching discussions, member implementation experiences, and the supplied project materials. It is designed to help readers make practical business decisions, build repeatable habits, and organize the work of growing a service-based business.

Use this resource to	Do not use this resource to
Plan marketing, relationships, lead follow-up, systems, and implementation.	Replace legal, tax, lending, licensing, or financial advice from a qualified professional.
Adapt worksheets and scripts to your business and market.	Present member case studies as guaranteed results or universal benchmarks.
Verify policies, pricing, platform features, and program rules before publishing them.	Copy unverified claims, expired offers, or private member details into public marketing.

BUSINESS BUILDER TIP

Treat this as a working document. Type into the worksheets, print the pages you need, and update your answers as your business changes.

Build the Business Behind the Service

Your technical expertise matters. A repeatable business system helps more people discover, trust, and hire you.

Most service professionals are trained to deliver the work, not necessarily to market it, explain its value, follow up consistently, or turn a busy week into a stable pipeline. The Business Builder Blueprint closes that gap with a practical system built around actions you can take now.

The Blueprint helps you	What that looks like
Position your value	Explain the problems you solve and why your approach matters.
Create visibility	Use useful content, presentations, events, and short-form video.
Strengthen relationships	Build reciprocal referral and marketing partnerships.
Capture opportunities	Move people from attention to an organized follow-up process.
Work with systems	Use weekly planning, accountability, automation, and delegation.
Grow intentionally	Track revenue activity and complete a 30-, 60-, and 90-day plan.

QUICK WIN

Choose one worksheet that solves the biggest problem in your business today. Complete that page before reading the rest of the Blueprint.

How to Use the Business Builder Blueprint

1. Complete the Business Builder Self-Assessment and identify your two lowest-scoring areas.
2. Choose one primary business outcome for the next 90 days. Do not try to fix everything at once.
3. Work through the chapter that supports that outcome and complete the related worksheet.
4. Schedule the action in your calendar, assign an owner, and define what completion looks like.
5. Review your progress weekly. Keep what works, improve what is unclear, and remove steps that add no value.
6. Use the Premium Elite Library for updated tools, recordings, and deeper implementation support.

COMMON MISTAKE

Collecting resources without scheduling implementation. A worksheet becomes valuable only when it changes what you do next.

BUSINESS BUILDER TIP

Use the Source Notes to trace an idea back to the coaching session that shaped it. This is especially important before publishing a claim or policy detail.

The Business Builder Success Framework

Five connected stages turn expertise into a more visible, trusted, and organized business.

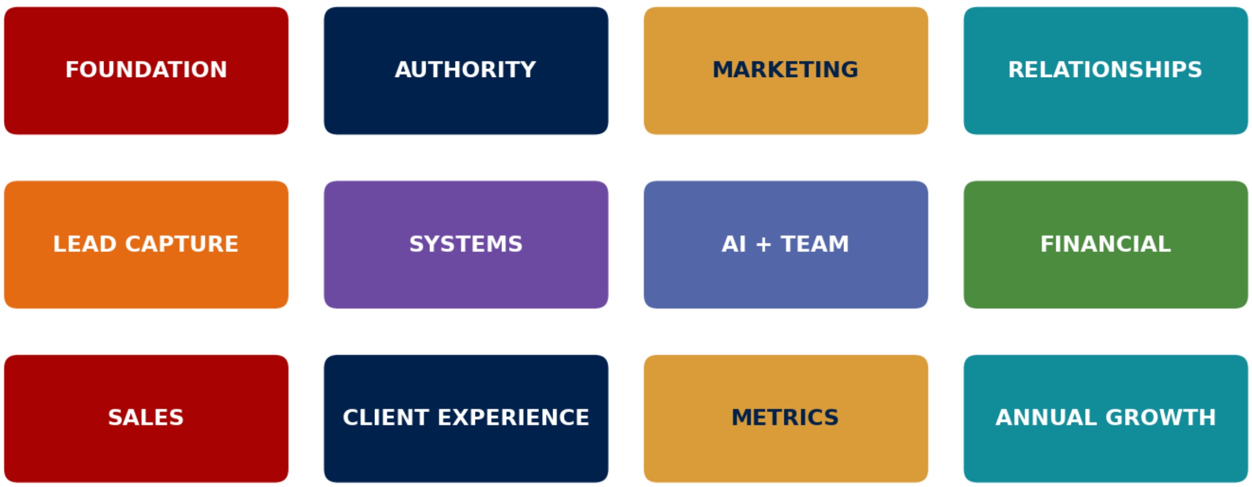
THE BUSINESS BUILDER SUCCESS FRAMEWORK

Stage	Core question	Blueprint chapters
1. Position	What problem do we solve, for whom, and why are we different?	Authority Positioning
2. Attract	How will the right people discover our expertise?	Marketing and Visibility
3. Connect	How will we build trust and reciprocal relationships?	Relationships and Referrals
4. Systemize	How will opportunities move forward without being dropped?	Lead Follow-Up, Systems, AI and Technology
5. Grow	What will we measure, improve, and repeat?	Financial Growth and 90-Day Implementation

How the Complete Blueprint Works

This comprehensive Blueprint connects strategy, conversion, client experience, measurement, and long-range planning to a practical business-building foundation.

THE COMPLETE BUSINESS-BUILDING ARCHITECTURE



Every pillar produces a decision, a repeatable action, and a measure.

Business foundation	Comprehensive application
Know what to do	Decide what matters most, why, and in what sequence
Use a worksheet	Connect the worksheet to an owner, deadline, system, and measure
Create visibility	Build a complete path from attention to follow-up and conversion
Build relationships	Tier partners, plan value exchanges, and track relationship health
Install systems	Document quality standards, decision points, and delegation boundaries
Set goals	Use capacity, conversion, profitability, and

Business foundation	Comprehensive application
	evidence to improve the plan

BUSINESS BUILDER TIP
You do not have to complete the Blueprint in order. Use the assessment and dashboard to begin with the part of the business that is limiting growth now.

Business Model Map

A business model explains how the business creates value, delivers it, earns revenue, and protects the capacity required to keep serving well.

Prompt	Your Notes
Primary audience	
Important problem or desired outcome	
Core service or offer	
Why clients choose this approach	
How prospects discover the business	
How trust is built	
How leads convert	
How the service is delivered	
Revenue model and payment timing	
Key partners, tools, and team roles	
Largest cost or capacity constraint	
Most important measure	

COMMON MISTAKE

Improving one part of the business without checking the effect on delivery capacity, client experience, cash flow, or team workload.

Build an Offer Ecosystem

An offer ecosystem gives clients and partners more than one useful way to engage while keeping every offer connected to the same authority position.

Offer level	Purpose	Examples	Next logical step
Free resource	Create awareness and a low-friction first action.	Checklist, guide, webinar, class, short video	Conversation or starter offer
Starter offer	Create an immediate win and qualify interest.	Assessment, review, workshop, limited-scope service	Core service
Core offer	Solve the primary client problem.	Inspection, consulting engagement, implementation project	Ongoing or advanced support
Premium offer	Provide deeper access, support, or implementation.	Advisory, done-for-you, membership, strategic partnership	Retention, referral, renewal
Partner offer	Create shared value with a complementary business.	Co-branded class, guide, webinar, client event	Ongoing co-marketing

Prompt	Your Notes
My free resource	
My starter offer	
My core offer	
My premium or ongoing offer	
My partner offer	
The transition between each level	

Annual Vision and Capacity Guardrails

Prompt	Your Notes
12-month revenue or business outcome	
Primary audience and offer	
Maximum active clients or projects we can serve well	
Hours or team capacity available each month	
Minimum quality standard that cannot be compromised	
Marketing activities we can sustain	
Processes that must be documented	
Work that should be delegated or automated	
Financial reserve or margin goal	
Personal boundaries or time we will protect	
One opportunity we will deliberately decline	

BUSINESS BUILDER TIP

A growth goal is incomplete until the business can explain the delivery capacity, cash timing, and system changes required to support it.

TABLE OF CONTENTS

Select a section title to move directly to that part of the Blueprint.

Business Builder Self-Assessment

Rate each statement from 1 (not in place) to 5 (consistently in place).

Area	Statement	Score
Authority	I can clearly explain who I help, the problem I solve, and why my approach is valuable.	1 2 3 4 5
Marketing	I publish useful content or hold visibility activities on a consistent schedule.	1 2 3 4 5
Relationships	I actively develop and appreciate referral or marketing partners.	1 2 3 4 5
Lead Capture	Every presentation, event, and campaign has a clear way to collect contact information.	1 2 3 4 5
Follow-Up	New leads enter an organized follow-up process with a next action and owner.	1 2 3 4 5
Systems	My recurring work is documented and can be repeated by me or a team member.	1 2 3 4 5
Technology	I use tools to reduce repeated manual work without losing the personal relationship.	1 2 3 4 5
Financial Growth	I know my revenue target, core offer economics, and weekly growth activities.	1 2 3 4 5
Implementation	I review goals weekly and complete specific actions with deadlines.	1 2 3 4 5

Prompt	Your Notes
Total score out of 45	
My two lowest-scoring areas	
The one area I will improve first	

Turn the Assessment Into a Priority

Score range	What it suggests	Recommended response
36-45	Strong foundation with room to optimize.	Choose one bottleneck and improve its consistency or measurement.
27-35	Several practices exist but may not connect into one system.	Map how attention becomes a lead, a conversation, and a client.
18-26	Growth activity is likely inconsistent or overly dependent on the owner.	Build one repeatable weekly process and one follow-up pipeline.
9-17	The business needs a focused foundation.	Start with positioning, one audience, one offer, and one weekly action.

Prompt	Your Notes
My 90-day business outcome	
Why this outcome matters now	
The metric that will show progress	
The weekly action most likely to influence it	
What I will stop or delay so this stays focused	

QUICK WIN
Put a 20-minute Blueprint review on your calendar every week for the next 12 weeks.

Create a Clear 90-Day Business Vision

A useful vision is specific enough to guide action. It names the audience, the offer or service, the business result, and the operating improvement required to support it.

Prompt	Your Notes
In 90 days, which service or offer should be easier to explain and sell?	
Which audience should recognize us as a useful resource?	
How many qualified conversations, presentations, or referrals do we want?	
Which recurring process must become more reliable?	
What personal or team capacity must be protected?	
What will be visibly different in the business at day 90?	

BUSINESS BUILDER TIP
Set activity measures you can control, such as partner conversations, presentations delivered, follow-ups completed, or pieces of useful content published.

Quarterly Goals and Measures

Outcome	Starting point	90-day target	Weekly activity	Owner
Qualified leads				
Referral partners				
Presentations or events				
Published content				
Revenue or project target				
System improvement				

Weekly review questions

- ☐ What moved forward this week?
- ☐ Which action created a conversation, referral, booking, or useful learning?
- ☐ Where did a lead or task stall?
- ☐ What is the smallest next action that will restore momentum?

COMMON MISTAKE

Tracking only final revenue. Revenue is delayed evidence. Also track the actions that create future revenue.

CHAPTER 1

Position Your Value

Stop leading with a job title. Lead with the problems you solve and the outcomes you help create.

IDEAL CLIENT • MARKET GAP • VALUE PROPOSITION

Authority Is Clarity, Not Volume

Authority positioning is the practice of making your expertise easy to understand. It is not about claiming to be the loudest person in the market. It is about connecting your knowledge to a specific problem, audience, and useful outcome.

Weak description	Stronger direction	Why it works
I am a home inspector.	I help buyers and their advisors understand property condition and renovation options before a deal becomes difficult.	The description begins with value and creates a conversation.
I have years of experience.	I help identify risks early and explain practical next steps to buyers, lenders, and agents.	Experience becomes a client benefit.
We provide reports.	We provide clear information that helps the project team make decisions and keep the file moving.	The deliverable is connected to an outcome.

BUSINESS BUILDER TIP

Use a value-based title when a technical title causes people to misunderstand your scope. Then explain the exact service and credentials clearly during the conversation.

Define the Problems You Solve

Prompt	Your Notes
My clients are trying to...	
The uncertainty or frustration they experience is...	
If the problem is not solved, the practical cost may be...	
My service helps by...	
The client or partner feels more confident because...	
The most useful outcome I can responsibly promise is...	

PROBLEM-TO-BENEFIT STATEMENT

I help [audience] who are dealing with [problem] by providing [service or method], so they can [responsible outcome].

COMMON MISTAKE

Listing process steps before the listener understands why the process matters. Translate each step into clarity, reduced risk, saved time, or a better decision.

Ideal Client Profile

Choose a client group that has a problem you understand, values the solution, and can be reached through relationships or consistent visibility.

Prompt	Your Notes
Primary audience or client type	
Their role in the decision	
The problem they notice first	
The problem they may not recognize yet	
What they want to avoid	
What a good outcome looks like to them	
Where they gather, learn, or network	
Who already has their trust	

QUICK WIN

Select one audience for the next 30 days. Adapt your content, presentation, and outreach to that audience before expanding.

Map the Real Competition

Competition includes more than businesses with the same title. A buyer may choose a lower-priced provider, accept guidance from an agent or lender, rely on online information, or do nothing because the service is confusing.

Type	Examples	Your research question
Direct	Professionals offering the same service.	What do they promise, package, and emphasize?
Indirect	Related professionals influencing the decision.	Why might the client follow their recommendation instead?
Hidden	Confusion, delay, status quo, or no decision.	What makes the client postpone or misunderstand the need?

Prompt	Your Notes
Three competitors or alternatives	
Common promise or message	
Strengths I respect	
Gap I can responsibly address	
One visibility action based on the gap	

Build an Authority Position

1. Name a specific audience whose problem you understand.
2. Identify the business or client outcome your expertise supports.
3. Find a gap between what the market emphasizes and what clients actually need.
4. Create one clear value statement that is accurate and supportable.
5. Prove the position through education, examples, process, and consistent follow-up.

Prompt	Your Notes
Audience	
Problem	
Method or expertise	
Outcome	
Proof or credibility asset	
My authority-position statement	

COMMON MISTAKE

Using superlatives such as 'number one' without objective substantiation, permission, or appropriate advertising review. Build authority with proof, not unsupported claims.

Value Proposition Builder

Component	Question	Your answer
Audience	Who benefits most from the service?	
Situation	When do they need you?	
Problem	What uncertainty, risk, or obstacle exists?	
Method	What do you do differently or especially well?	
Outcome	What useful result does the client gain?	
Proof	What experience, process, result, or relationship supports the claim?	

VALUE PROPOSITION FORMULA

For [audience] facing [situation or problem], we provide [service or method] so they can [outcome]. Unlike [common alternative], our approach emphasizes [credible difference].

BUSINESS BUILDER TIP

Use plain language in public marketing. Explain technical terms only when they help the audience make a better decision.

Elevator Pitch Builder

A useful elevator pitch should invite a question, not deliver your entire resume.

Length	Structure	Example direction
10 seconds	Who you help + problem	I help buyers and real estate professionals understand property condition and renovation options before the deal becomes difficult.
30 seconds	Who + problem + method + benefit	I work with buyers, lenders, and agents when a property needs repairs. I help translate property condition into a clear renovation path so the team can make decisions with fewer surprises.
60 seconds	Add proof + next question	Use the 30-second version, add one relevant example, then ask about the listener's current clients or challenges.

Prompt	Your Notes
My 10-second version	
My 30-second version	
My 60-second version	
The question I will ask next	

Create Credibility Assets

- ◻ A short professional biography focused on the problems you solve.
- ◻ A clear one-sheet or service overview for referral partners.
- ◻ A book, guide, checklist, or useful client resource.
- ◻ A presentation that teaches and includes a measurable call to action.
- ◻ Testimonials or case studies used with permission and accurate context.
- ◻ Professional profiles that repeat the same value proposition.
- ◻ A follow-up process that demonstrates reliability after the first conversation.

Prompt	Your Notes
Credibility asset to create or update	
Audience	
Message it should reinforce	
Owner	
Due date	
Distribution plan	

QUICK WIN

Update one professional profile today so a visitor can immediately see what you do, who you help, and why your approach matters.

CHAPTER 2

Build a Consistent Marketing Engine

Become a useful resource through content, short-form video, events, and presentations.

CONTENT • VIDEO • PRESENTATIONS

Marketing Is a Repeatable Process

Consistent marketing reduces the feast-or-famine cycle. The goal is not to publish everywhere. The goal is to choose a useful message, a reachable audience, and a schedule you can sustain.

Marketing job	Question	Example activity
Educate	What does the audience need to understand?	Tip, checklist, webinar, CE class, FAQ video
Demonstrate	How can people see the work or process?	Behind-the-scenes post, case study, jobsite explanation
Invite	What is the next step?	Download, reply, schedule, attend, or introduce
Follow up	How will the relationship continue?	Email, text, call, partner visit, or nurture campaign

Prompt	Your Notes
Primary audience for this quarter	
Main problem or topic	
Primary visibility channel	
Weekly publishing or outreach rhythm	
Lead-capture action	
Follow-up owner	

The Four-Post Authority Framework

Post type	Purpose	Prompt
Teach	Make expertise useful.	What is one practical thing my audience should know?
Show	Make the work visible.	What can I show from a project, meeting, process, or day in the business?
Success or lesson	Create proof and relevance.	What changed, what did we learn, and what should others do?
Personal connection	Help people know the person behind the expertise.	What appropriate value, community activity, or personal interest builds connection?

BUSINESS BUILDER TIP

Do not try to become an influencer. Become the resource people remember when the right problem appears.

COMMON MISTAKE

Waiting for a perfect strategy before posting. Start with one useful answer, one real example, and one clear next step.

30-Day Content Planner

Week	Teach	Show	Success or lesson	Personal connection	CTA
1					
2					
3					
4					

Prompt	Your Notes
The one theme that connects this month	
Lead magnet or offer to mention	
Photos or video clips needed	
Who will draft, design, approve, and publish	
How results will be reviewed	

QUICK WIN

Write four teaching headlines now. Each headline should answer one question you hear repeatedly from buyers, lenders, agents, or clients.

The 15- to 30-Second Video Formula

Part	Timing	Job	Prompt
Hook	First 3-5 seconds	Stop the scroll with relevance.	If you are considering a fixer-upper, check this before...
Value	Next 10-20 seconds	Teach one idea or show one thing.	Here is the one sign, question, or step to understand...
Engagement	Final seconds	Ask a specific question or give one next step.	Which part of this process is most confusing?

- □ Add captions so the message works without sound.
- □ Use one topic per video.
- □ Keep the first frame clear and relevant.
- □ End with a question, download, reply, or scheduling action.
- □ Have a team member monitor comments and route qualified responses.

COMMON MISTAKE

Opening with a long introduction. Earn attention first by naming the audience's question or problem.

Short-Form Video Planner

Prompt	Your Notes
Audience	
Question or problem	
Hook	
One teaching point or visual	
Call to action	
Caption text	
Recording location or footage needed	
Publish date and channel	
Comments or leads to follow up	

SIMPLE VIDEO SCRIPT

[Hook] If you are [audience or situation], here is one thing to check. [Value] Explain one practical point. [CTA] If you want the checklist or have a question, comment or send me a message.

Use Seasonal Campaigns to Be Memorable

A seasonal campaign works when it supports a real business objective. The July coaching session used 'Christmas in July' to show how appreciation can stand out when inboxes and offices are less crowded than at year-end.

Campaign element	Decision
Audience	Top referral partners, past clients, or a defined professional group
Business objective	Appreciation, reactivation, introductions, education, or event attendance
Useful gesture	Note, coffee, educational guide, partner spotlight, class invitation, or small gift
Follow-up	A genuine conversation, no-pressure check-in, or value-sharing message
Measurement	Contacts reached, replies, meetings, introductions, or referrals

BUSINESS BUILDER TIP

Use a budget tied to the relationship's business value and your own financial limits. Appreciation should feel thoughtful, not transactional.

Seasonal Campaign Planner

Prompt	Your Notes
Campaign name and date range	
Audience	
Goal	
Offer, resource, event, or gesture	
Message theme	
Channels	
Assets needed	
Follow-up sequence	
Budget	
Success measures	

- □ Handwritten note
- □ Coffee or lunch
- □ Educational resource
- □ Partner spotlight
- □ Appreciation event
- □ Personalized video
- □ Class or event invitation

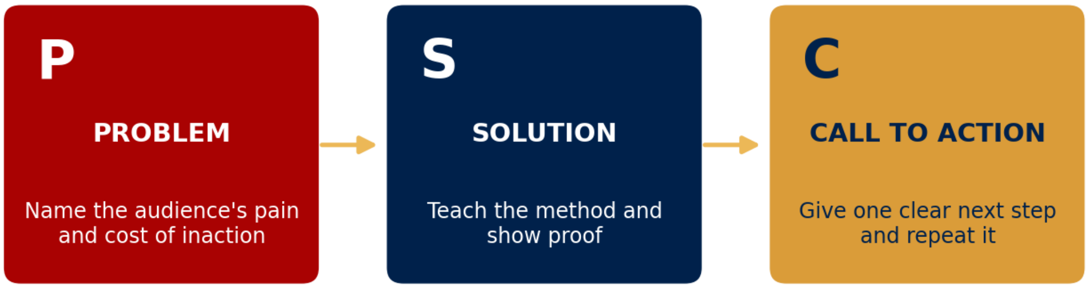
Create Visibility Through Events

Channel	Best use	Action
Professional associations	Reach lenders, agents, or industry peers.	Research the calendar, attend first, and offer education around a real need.
Public event platforms	Find workshops, expos, and local business events.	Attend, sponsor selectively, or host a useful public session.
Brokerages and offices	Teach practical information to a concentrated audience.	Lead with the office's business benefit, not a generic sales pitch.
Community organizations	Build local familiarity and reciprocal relationships.	Participate consistently and support priorities that matter to the group.
Partner databases	Co-market to an audience that already trusts the partner.	Create a shared webinar, guide, or client event.

Prompt	Your Notes
Three events or organizations to research	
The audience I can help	
The teaching topic I can offer	
The lead-capture method	
Follow-up date	

The PSC Presentation Framework

A PRESENTATION SHOULD MOVE PEOPLE FROM A PROBLEM TO AN ACTION



Stage	What to include	What to avoid
Problem	Audience pain, stakes, relevant questions, and the cost of inaction.	Starting with a long biography or technical detail.
Solution	A clear method, useful education, proof, examples, and why it matters.	Overloading slides with text or teaching without a decision path.
Call to Action	One offer, value, next step, repeated instructions, and objection handling.	Ending with a vague 'contact me sometime.'

Presentation Planner and Checklist

Prompt	Your Notes
Audience and event	
The primary problem	
Three supporting pain points	
The solution or framework	
Proof, case study, or demonstration	
Offer or next step	
Lead-capture method	
Objection to address	
Follow-up sequence	

- ☐ Slides use images or short phrases rather than paragraphs.
- ☐ The CTA appears before the final slide and again at the close.
- ☐ QR code, keyword, or URL has been tested on a phone.
- ☐ A team member owns attendee follow-up.
- ☐ The recording and presentation can be repurposed.

Case Study: Measure the Lead Path

SOURCE-REPORTED MEMBER CASE STUDY

Use as an example of a measurable lead path, not as a guaranteed result.

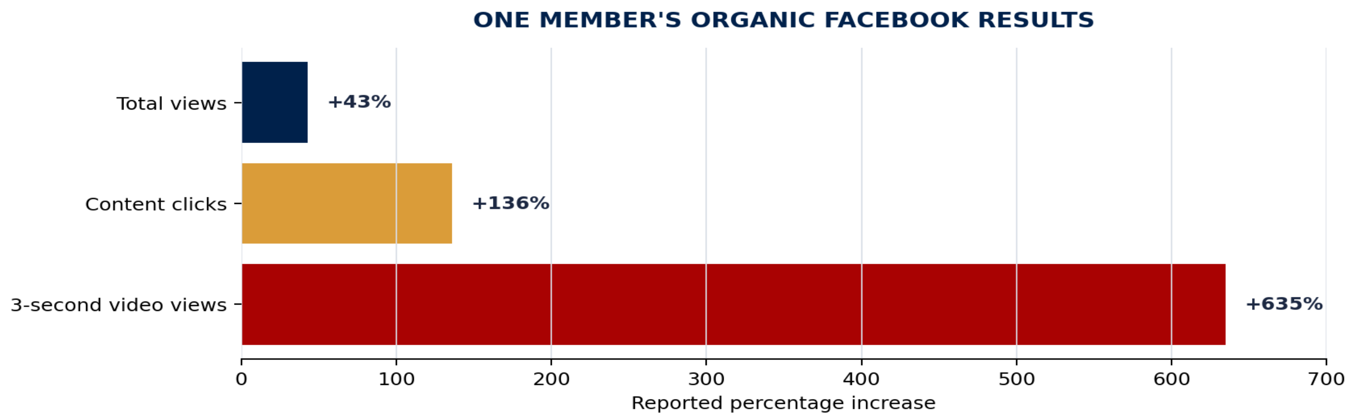
A July 14 member report connected a presentation to a text-to-download offer, captured 18 leads from 28 attendees, and generated two reported inspections at $450 each. The practical lesson is to measure attendance, capture, qualification, follow-up, and revenue.

Prompt	Your Notes
Audience reached	
Leads captured	
Qualified conversations	
Appointments or projects	
Revenue connected to activity	
What to improve next time	

BUSINESS BUILDER TIP

Case studies should be attributed, permissioned, and presented as examples. Never imply that another business will receive the same result.

Case Study: Organic Visibility Can Be Measured



Source-reported case study. Results are not a benchmark or guarantee.

One member reported increased organic Facebook activity after consistent VA-supported posting. The practical takeaway is not the percentage itself. The takeaway is to establish a baseline, publish consistently, and review the platform measures that connect to business conversations.

Prompt	Your Notes
Current 30-day baseline	
Content rhythm to test	
Measures to track	
Lead or conversation indicator	
Review date	
What we learned	

CHAPTER 3

Grow Through Relationships

Build reciprocal marketing partnerships that create trust, visibility, and opportunity for both sides.

PARTNERS • VALUE • APPRECIATION

From Referral Source to Marketing Partner

A referral can be a one-time transaction. A marketing partnership is an ongoing exchange of value. The partnership works when both businesses understand the shared audience, the problems they can solve together, and the actions they will take.

Referral-only thinking	Marketing-partner thinking
Who can send me business?	Who serves the same audience in a complementary way?
What can I ask for?	What useful value can we create for each other's clients?
Did I get a referral?	Did we teach, introduce, co-promote, or support each other?
Follow up when I need work.	Maintain the relationship on a planned rhythm.

QUICK WIN

Identify three businesses that already serve your ideal client before, during, or after your service.

Build a Partner Map

Partner group	Examples from the source sessions	Value you might exchange
Real estate and lending	Agents, brokerages, loan officers, mortgage associations	Education, property insight, client resources, introductions
Property services	Contractors, radon or sewer providers, termite professionals, suppliers	Cross-referrals, shared guides, webinars, project clarity
Local business and community	Bookstores, restaurants, barbers, salons, chambers, charities	Events, spotlights, community visibility, appreciation
Professional education	Associations, CE hosts, panels, workshop organizers	Speakers, content, attendee resources, follow-up

Prompt	Your Notes
Top five potential partners	
Shared audience	
Value I can offer	
Value they may offer	
First relationship-building action	

Lead With Value

1. Research the partner's audience, priorities, and current activities.
2. Choose one useful resource, introduction, event, or educational idea.
3. Invite a short conversation about a shared client problem.
4. Agree on one small action instead of proposing an elaborate partnership immediately.
5. Follow through quickly and make the next step easy.
6. Review the relationship quarterly and continue creating value.

PARTNER CONVERSATION OPENER

I work with many of the same people you serve, and I have an idea that may be useful to your clients. Would you be open to a short conversation about [resource, class, guide, or event] and how we could make it easy for your team to share?

COMMON MISTAKE

Calling a relationship reciprocal when the other partner receives no clear value. Define the benefit to their clients, their team, or their visibility.

Partnership Scripts

WARM INTRODUCTION REQUEST
I believe [person or company] may benefit from [specific resource or conversation]. If you are comfortable, would you introduce us by email? I will keep the conversation useful and respect their time.
LUNCH-AND-LEARN INVITATION
I can provide a practical, no-pressure session for your team on [topic]. The goal is to help them understand [problem or opportunity] and leave with a simple client resource. Would a 20-minute planning call be useful?
QUARTERLY CHECK-IN
I wanted to check in and ask what your clients or team are running into right now. Is there a question, resource, or introduction that would be useful this quarter?
REFERRAL THANK-YOU
Thank you for trusting me with [client or opportunity]. I appreciate the introduction and will keep the process professional and clear. Please let me know how I can support you or your clients in return.

Use a Book or Guide as an Authority Asset

The April 21 discussion showed how a book or guide can become an introduction to presentations, media, events, and referral conversations. The asset works best when it solves a specific audience problem and has a clear distribution plan.

Use	Action
Presentation entree	Send the asset with a short note tied to the audience's problem.
Partner gift	Provide a digital or physical copy the partner can share with clients.
Follow-up	Flag the page most relevant to the conversation and invite a response.
Event visibility	Use book signings, workshops, or community events to create conversations.
Lead capture	Offer the digital resource through a QR code, keyword, or short form.

Prompt	Your Notes
Asset title	
Audience problem	
Format	
Distribution partners	
Lead-capture method	
Follow-up	

Co-Marketing Webinar Planner

Prompt	Your Notes
Partner	
Shared audience	
Client problem	
Webinar title and promise	
Partner's teaching role	
My teaching role	
Promotion responsibilities	
Lead-capture and consent process	
Call to action	
Replay and repurposing plan	
Follow-up owners and dates	

BUSINESS BUILDER TIP

Choose a topic that is useful even if an attendee never buys. Trust grows when the teaching stands on its own.

Build an Appreciation System

Rhythm	Examples	Purpose
After every referral	Personal thank-you, status update, useful resource	Confirm reliability and gratitude
Monthly	Partner spotlight, introduction, coffee, short check-in	Maintain visibility without asking for business
Quarterly	Office visit, webinar, class, client resource, partnership review	Create shared value
Mid-year	Appreciation campaign or event	Stand out before the year-end rush
Year-end	Review wins, thank partners, plan next year	Turn goodwill into a clear next chapter

Prompt	Your Notes
Top ten partners	
Last meaningful contact	
Value created this year	
Next appreciation action	
Date	

30-Day Relationship Plan

Week	Focus	Actions	Measure
1	Map	Identify 10 partners; research priorities; choose top 5.	List completed
2	Reconnect	Send 5 genuine messages; schedule 2 conversations.	Replies and meetings
3	Create value	Share 1 resource; make 1 introduction; spotlight 1 partner.	Value actions completed
4	Build together	Propose 1 small co-marketing or educational activity.	Next step agreed

Prompt	Your Notes
The five people I will contact	
The one resource I will share	
The one introduction I can make	
The one partnership idea I will propose	
Review date	

CHAPTER 4

Capture and Follow Up With Leads

Give every visibility activity a clear path from attention to a useful next conversation.

CAPTURE • QUALIFY • FOLLOW UP

Design the Lead Path Before the Campaign

THE BUSINESS BUILDER LEAD PATH

A campaign is incomplete if people see it but have no easy way to respond. Build the path before the presentation, event, social post, or partner promotion goes live.

QUICK WIN
Open your latest presentation or social profile. Is there one clear response action and an assigned follow-up owner? Fix that first.

Source foundation: April 7 mobile lead capture; April 21 pipeline automation; June 16 presentation capture; June 30 Mobex Pro; July 14 member case study.

Lead Magnet Planner

Prompt	Your Notes
Audience	
Immediate question or problem	
Resource title	
Format: checklist, guide, calculator, video, class, or template	
What the resource helps them do	
Information genuinely needed to deliver it	
Consent language and communication expectations	
Delivery method	
Next follow-up action	
Success measure	

BUSINESS BUILDER TIP

Make the resource specific enough to be used today. A short checklist tied to a real decision often outperforms a broad guide no one finishes.

Use QR Codes, Keywords, and Forms Intentionally

Method	Best use	Quality check
QR code	Printed material, slides, signs, and in-person events.	Scan from multiple phones and distances before the event.
Text keyword	Presentations, conversations, video, and simple mobile response.	Confirm the exact keyword, consent flow, delivery message, and ownership of replies.
Short URL	Email, spoken instructions, profiles, and backup for QR codes.	Use a readable destination and test redirects.
Form	Qualification, scheduling, or resource delivery.	Ask only for information needed for the next step.

- ◻ The call to action is repeated verbally and visually.
- ◻ The confirmation message explains what happens next.
- ◻ Contact permission is captured appropriately.
- ◻ A team member is assigned to monitor replies.
- ◻ The lead source is tagged for reporting.

Lead Qualification Form Builder

Qualification should help you prepare and prioritize. It should not create unnecessary friction or collect information you do not need.

Field	Why it may matter	Include ?
Name and preferred contact	Basic delivery and follow-up	☐
Role or relationship to project	Helps tailor the conversation	☐
Property, service, or project type	Clarifies relevance	☐
Primary question or challenge	Reveals need in their own words	☐
Timing	Supports prioritization	☐
Budget or readiness question	Use only when necessary and respectfully framed	☐
How they heard about you	Measures the source	☐
Permission and expectations	Clarifies future communication	☐

Prompt	Your Notes
The minimum information we need	
Questions to remove	
Confirmation message	
Assigned follow-up owner	

Build a Simple CRM Pipeline

Stage	Entry rule	Required next action	Exit rule
New lead	Form, keyword, referral, call, or event response	Confirm receipt and review need	Contacted or disqualified
Contacted	First response sent or call attempted	Schedule next attempt or conversation	Connected or nurture
Qualified	Need, timing, and fit confirmed	Book consultation or send offer	Offer sent or nurture
Offer or next step	Proposal, appointment, or service path presented	Follow up by a specific date	Won, lost, or nurture
Won	Client commits	Onboard and thank source	Service underway
Nurture	Not ready but appropriate to continue	Send useful, permission-based follow-up	Requalified or unsubscribed

COMMON MISTAKE

Creating pipeline stages without a required next action. Every active lead needs an owner and a date.

Create a Follow-Up Cadence

Timing	Purpose	Example action
Immediately	Deliver what was promised and set expectations.	Confirmation email or text with the resource and next step
Within 1 business day	Make the response personal.	Short message tied to their question, role, or event
Day 3-4	Add useful context.	Relevant checklist, example, or answer
Day 7	Invite a clear conversation.	Schedule, reply, or attend
Day 14-21	Continue only with relevance and permission.	Case study, partner resource, or timely reminder
Ongoing	Stay useful without overwhelming the contact.	Segmented nurture based on interest

Prompt	Your Notes
Trigger	
Audience segment	
Messages	
Channels	
Owner	
Stop or exit rule	
Primary metric	

Follow-Up Templates

RESOURCE DELIVERY
Here is the [resource] you requested. It will help you [specific use]. If you are working through [related situation], reply with your biggest question and I will point you to the most relevant section.
EVENT FOLLOW-UP
Thank you for joining the session on [topic]. You mentioned [question or interest]. Here is the resource we discussed. Would a short conversation next week be useful?
REFERRAL FOLLOW-UP
[Partner] suggested we connect because you are working through [situation]. I would be glad to learn what you need and explain whether my process is a fit. Would [two options] work for a brief call?
NO-RESPONSE CLOSE-THE-LOOP
I wanted to close the loop on [topic]. If the timing is not right, no problem. I will pause my follow-up. If you would like the [resource or next step] later, reply here and I will help.

Lead Tracker

Date	Name / company	Source	Need	Stage	Next action	Owner	Due

- ☐ Every active lead has a next action.
- ☐ Every next action has a date and owner.
- ☐ Lead source is recorded.
- ☐ Closed, lost, or paused leads have a reason.
- ☐ Weekly review identifies stalled opportunities.

Install Business Systems

Replace inconsistent effort with clear processes, weekly priorities, and visible accountability.

PROCESS **PRIORITY** **ACCOUNTABILITY**

Choose Process Over Probability

The March 24 coaching session contrasted inconsistent probability marketing with a defined process. A process does not guarantee the outcome, but it gives you something you can repeat, measure, and improve.

Probability behavior	Process behavior
Market only when work is slow.	Schedule weekly visibility even during delivery-heavy weeks.
Contact a large random list.	Choose a defined audience and test a consistent outreach sequence.
Hope a presentation creates business.	Capture attendees, follow up, and measure the path.
Rely on memory.	Use a checklist, pipeline, calendar, or owner.
Abandon an activity after one attempt.	Define a reasonable test period and review evidence.

BUSINESS BUILDER TIP

Practice a new process with a smaller, lower-risk audience. Improve the message and steps before using it for your most valuable opportunity.

SOP Process Mapper

Prompt	Your Notes
Process name	
Trigger: what starts it	
Desired outcome	
Step 1	
Step 2	
Step 3	
Step 4	
Decision or exception	
Owner	
Tools or templates	
Completion evidence	
Review date	

COMMON MISTAKE

Documenting an ideal process no one actually follows. Map the current process first, then improve one failure point at a time.

Weekly Planning Worksheet

Area	This week's outcome	Key action	Time block	Owner
Client delivery				
Marketing				
Relationships				
Lead follow-up				
Systems or team				
Financial review				

Prompt	Your Notes
The one result that matters most this week	
Three must-do actions	
What I will delegate	
What I will defer	
Friday review: completed, learned, next	

QUICK WIN

Schedule your growth work before the week fills with delivery work. Protect one recurring marketing block and one follow-up block.

One Small Step Action Planner

Large business goals become manageable when the next action is small, specific, and scheduled.

Prompt	Your Notes
Goal	
Why it matters	
Smallest useful next action	
Can it be completed in 15-30 minutes?	
Owner	
Scheduled date and time	
Completion evidence	
Next small step	

BUSINESS BUILDER TIP

If an action contains the word 'and,' it may be more than one step. Split it until the first step is obvious.

Weekly Accountability Scorecard

Commitment	Target	Actual	Status	Learning / next step
Marketing activity			□ Done □ Partial □ Missed	
Partner relationship			□ Done □ Partial □ Missed	
Lead follow-up			□ Done □ Partial □ Missed	
System improvement			□ Done □ Partial □ Missed	
Revenue activity			□ Done □ Partial □ Missed	

Prompt	Your Notes
Biggest win	
Biggest obstacle	
The decision I avoided	
Help or resource needed	
Commitment before next review	

COMMON MISTAKE

Turning accountability into self-criticism. Use the review to understand the process and choose the next action.

Delegation and VA Handoff Checklist

Handoff element	Question
Outcome	What result should the task produce?
Trigger	When should the task begin?
Inputs	What files, access, examples, or information are required?
Steps	What sequence should be followed?
Quality standard	What does good work look like?
Authority	What can the team member decide without approval?
Escalation	What requires the owner's review?
Deadline	When is the task due and how will completion be confirmed?
Feedback	When will the process be reviewed and improved?

BUSINESS BUILDER TIP

Delegate the process, not just the task. Provide examples, access, a deadline, and a definition of done.

CHAPTER 6

Use AI and Technology With Purpose

Choose tools that support a clear process, protect judgment, and make consistent execution easier.

PROMPT • REVIEW • REPURPOSE

Start With the Workflow, Not the Tool

Business need	Useful technology role	Human responsibility
Market research	Organize competitor observations and identify possible gaps.	Verify facts, judge relevance, and avoid unsupported claims.
Content creation	Draft outlines, scripts, posts, and variations.	Add expertise, examples, voice, accuracy, and approval.
Presentations	Apply a framework and create a first draft.	Decide the audience problem, proof, offer, and delivery.
Lead follow-up	Trigger delivery, reminders, tagging, and routing.	Respond personally to qualified conversations and monitor consent.
Meeting repurposing	Extract lessons, clips, checklists, and action items.	Confirm context, attribution, privacy, and source accuracy.

COMMON MISTAKE

Automating a broken or unclear process. Define the trigger, steps, owner, and success measure before adding software.

Prompt Builder

Prompt element	What to provide
Role	The expertise or perspective the assistant should apply
Audience	Who will use or read the result
Objective	The business outcome or deliverable
Source material	Transcripts, notes, examples, approved claims, and links
Constraints	Voice, length, compliance, exclusions, and formatting
Structure	Framework, sections, worksheet fields, or output table
Quality checks	Accuracy, actionability, citations, missing information, and review flags

REUSABLE PROMPT FORMULA

Act as [role]. Using only the supplied sources, create [deliverable] for [audience] so they can [objective]. Follow [framework]. Use [voice and format]. Do not invent facts, quotes, results, or links. Flag missing or conflicting information and end with a quality checklist.

Business Builder AI Prompt Library

AUTHORITY PROMPT
Analyze the supplied client questions and competitor notes. Identify three responsible authority positions based on audience pain, a market gap, and proof we can support. Explain the tradeoffs of each.
CONTENT PROMPT
Turn the supplied lesson into four posts: Teach, Show, Success or Lesson, and Personal Connection. Give each a hook, concise body, CTA, and required fact-checks.
PRESENTATION PROMPT
Build a Problem-Solution-Call to Action outline for [audience]. Use only the approved source material. Include audience questions, proof, one offer, objection handling, and repeated CTA instructions.
FOLLOW-UP PROMPT
Create a permission-based follow-up sequence for a lead who requested [resource]. Use immediate delivery, personal context, useful education, a clear invitation, and a respectful close-the-loop message.
SOP PROMPT
Convert the supplied demonstration or transcript into an SOP with trigger, prerequisites, numbered steps, decision points, owner, quality checks, completion evidence, and review questions.

Content Repurposing Workflow

1	Select one recording, presentation, client question, or detailed note.
2	Identify the core lesson, audience, and decision it supports.
3	Create one long-form resource such as a guide, article, or training outline.
4	Extract short-form assets: videos, posts, emails, checklists, and FAQs.
5	Add one lead-capture action and one follow-up path.
6	Review facts, privacy, permissions, links, and brand voice.
7	Publish on a schedule and record the source and results.

Source	Long-form asset	Short assets	CTA	Owner	Publish dates

Technology Checklist

Need	Current tool	Owner	Working ?	Next improvement
Contact database or CRM			□ Yes □ No	
Forms and lead capture			□ Yes □ No	
Email follow-up			□ Yes □ No	
Text follow-up			□ Yes □ No	
Scheduling			□ Yes □ No	
Presentation creation			□ Yes □ No	
Design and video			□ Yes □ No	
File and template library			□ Yes □ No	
Team communication			□ Yes □ No	
Reporting and metrics			□ Yes □ No	

BUSINESS BUILDER TIP

Use the fewest tools needed to support a reliable workflow. More software does not automatically create a better system.

CHAPTER 7

Strengthen Financial Growth

Connect revenue goals to weekly activity, protect the scope of your work, and review decisions with qualified professionals.

REVENUE • SCOPE • REVIEW

Revenue Goal Calculator

Prompt	Your Notes
Quarterly revenue target	
Average revenue per completed service or project	
Number of completed services or projects required	
Estimated conversion rate from qualified conversation to client	
Qualified conversations required	
Estimated lead-to-conversation rate	
Leads required	
Weekly lead-generation activity required	

Planning formulas

- Required projects = revenue target ÷ average project revenue
- Required qualified conversations = required projects ÷ conversion rate
- Required leads = required qualified conversations ÷ lead-to-conversation rate
- Weekly activity = required leads ÷ number of working weeks

BUSINESS BUILDER TIP
Use your own historical numbers. If you do not have them, start tracking now and label the first plan as a test rather than a forecast.

Protect Scope and Revenue

Several coaching discussions focused on the risk of performing extra work without a defined scope, fee, or documentation. The broader lesson applies to any service business: clarify what is included, what triggers extra work, and how changes are approved.

Scope control	Question to answer
Included work	What exactly is included in the base service?
Assumptions	What information, access, or client action does the scope depend on?
Change trigger	What causes extra review, travel, revisions, administration, or meetings?
Approval	Who may authorize the change and in what form?
Fee	How will additional work be priced and invoiced?
Risk protection	What agreements, disclosures, or professional review are required?
Completion	What evidence confirms the service or change is complete?

IMPORTANT

Industry-specific examples discussed in coaching, including draw structures and administrative fees, must be reviewed against current lender requirements, contracts, licensing rules, and local law before use.

Offer and Pricing Review

Prompt	Your Notes
Primary service or offer	
Client problem and outcome	
Included deliverables	
Excluded work	
Common change requests	
Time and direct costs	
Price and payment timing	
Margin or capacity concern	
Proof of value	
Policy or contract review needed	
Next pricing decision	

COMMON MISTAKE

Reducing price before clarifying value and scope. If a prospect wants a lower price, identify which deliverables or service levels would change.

Tax and Financial Planning Checklist

The April 7 session included time-sensitive tax education. Because deadlines, thresholds, entity rules, and individual circumstances change, this Blueprint does not reproduce them as ongoing instructions. Use this checklist to prepare a conversation with a qualified tax professional.

- ☐ Confirm the tax classification of the business and whether it still fits the operation.
- ☐ Confirm federal, state, and local filing and payment deadlines for the current year.
- ☐ Review estimated payment requirements and cash reserves.
- ☐ Review payroll, bookkeeping, and recordkeeping responsibilities.
- ☐ Discuss whether deductions, reimbursements, or entity changes are properly documented.
- ☐ Ask what to do immediately if a deadline was missed.
- ☐ Document the professional's recommendations, owner, and due dates.

Prompt	Your Notes
Questions for my tax professional	
Documents to gather	
Deadlines confirmed	
Actions and owner	
Next review date	

IMPORTANT

This page is educational planning support, not tax or legal advice.

CHAPTER 8

Implement the Blueprint

Turn the plan into action over 30, 60, and 90 days with a focused sequence and weekly review.

FOUNDATION • CONSISTENCY • OPTIMIZATION

The 90-Day Roadmap

Phase	Primary objective	Do not advance until
Days 1-30	Clarify positioning, choose one audience, establish a weekly rhythm, and create one lead path.	The offer, message, CTA, and weekly actions are clear.
Days 31-60	Publish consistently, build partner conversations, and follow up through an organized pipeline.	The process is being used often enough to learn from it.
Days 61-90	Review evidence, improve conversion points, document the process, and delegate repeatable work.	The next quarter's decision is based on real activity and results.

30-Day Action Plan: Build the Foundation

Week	Priority	Required actions	Measure
1	Assess and focus	Complete assessment; choose audience; define 90-day outcome.	Outcome and owner documented
2	Position	Complete problem, ideal client, competition, and value worksheets.	Approved value proposition
3	Create the path	Choose one marketing activity, lead magnet, CTA, and pipeline.	End-to-end test completed
4	Launch and review	Publish or present; follow up; review activity and friction.	First baseline recorded

Prompt	Your Notes
My day-30 outcome	
Actions I will complete	
People or tools needed	
Weekly review time	
Evidence of completion	

60-Day Action Plan: Build Consistency

Weeks	Priority	Required actions	Measure
5-6	Visibility rhythm	Use the four-post framework or deliver a presentation; repurpose one source.	Content or event activity
5-6	Relationships	Contact five partners and create at least one value action.	Replies, meetings, value shared
7	Follow-up	Run the cadence, update pipeline stages, and close stalled loops.	Next action on every lead
8	Systemize	Document one recurring process and delegate one defined task.	SOP used by owner or team

Prompt	Your Notes
My day-60 outcome	
Consistency target	
Partner action	
System to document	
Evidence of progress	

90-Day Action Plan: Optimize and Grow

Weeks	Priority	Required actions	Measure
9-10	Measure	Review sources, lead stages, conversions, revenue, and capacity.	Quarter-to-date dashboard
10-11	Improve	Fix the weakest point in the lead or delivery path.	One measurable process change
11	Strengthen proof	Document a permissioned case study, testimonial, or lesson.	Credibility asset completed
12	Plan next quarter	Choose what to continue, stop, delegate, or expand.	Next 90-day outcome approved

Prompt	Your Notes
My day-90 outcome	
Best-performing activity	
Weakest process point	
What I will stop	
What I will repeat or expand	
Next quarter's focus	

Final Business Builder Checklist

- ☐ My ideal client and their problem are clearly defined.
- ☐ My value proposition is accurate, specific, and easy to explain.
- ☐ My profiles, one-sheet, and key messages are consistent.
- ☐ I have one sustainable weekly marketing rhythm.
- ☐ My content and presentations use a clear call to action.
- ☐ I am actively creating value for referral and marketing partners.
- ☐ Every new lead enters an organized follow-up process.
- ☐ Every active opportunity has an owner and next-action date.
- ☐ At least one recurring process is documented.
- ☐ Technology supports a defined workflow and is reviewed by a person.
- ☐ Revenue targets are connected to controllable weekly activities.
- ☐ Scope, pricing, and professional-review needs are documented.
- ☐ I review progress weekly and choose the next small step.
- ☐ My next 90-day outcome is clear.

Prompt	Your Notes
The three items I will complete next	
Owner	
Deadline	
Evidence	

CHAPTER 9

Build a Sales and Conversion System

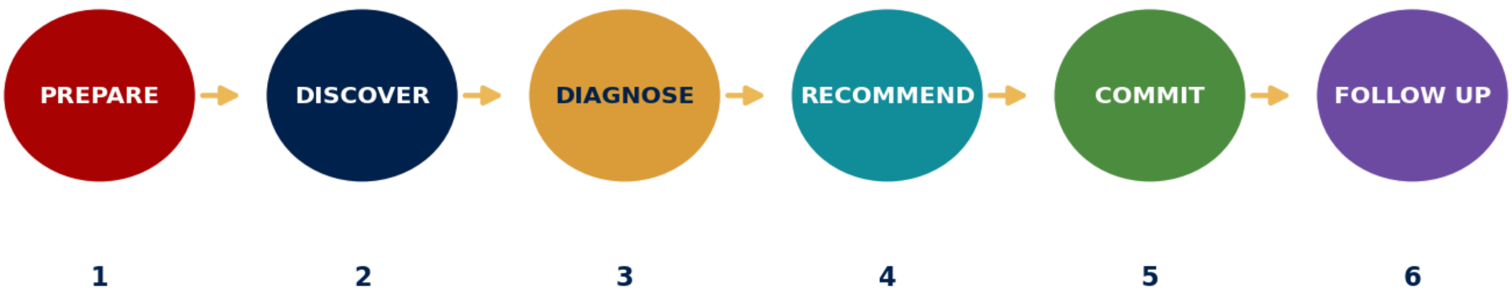
Turn qualified interest into a clear, ethical decision process that protects fit, value, scope, and follow-through.

DISCOVER • QUALIFY • PROPOSE • FOLLOW UP

The Sales Conversation System

A good sales process helps both sides decide whether the problem, timing, scope, and working relationship are a fit.

CONSULTATIVE SALES CONVERSATION



Stage	Purpose	Completion evidence
Prepare	Review the source, relationship context, likely need, and approved offer.	Brief and questions ready
Discover	Understand the situation, desired outcome, impact, timing, and decision process.	Need documented in the client's words
Qualify	Confirm fit, authority, urgency, capacity, and professional-review needs.	Proceed, nurture, refer, or decline
Recommend	Connect the appropriate scope to the stated problem and outcome.	Recommendation and rationale clear
Decide	Address questions and agree on the next action without pressure.	Decision, owner, and date documented
Handoff	Transfer promises, scope, files, and relationship context into delivery.	Internal handoff accepted

Offer Readiness Review

Prompt	Your Notes
Offer name and intended audience	
Problem the offer is designed to solve	
Responsible outcome the offer supports	
Included deliverables and service boundaries	
Typical timeline and client responsibilities	
Price, payment timing, and change conditions	
Proof, experience, or process that supports the recommendation	
Who should not purchase this offer	
Capacity available during the next 30 days	
Contract, licensing, tax, lender, or legal review required	

COMMON MISTAKE

Selling an offer before defining who it is for, what is included, and what must happen for delivery to succeed.

Discovery Call Planner

Conversation area	Questions to adapt
Context	What prompted the conversation? What has changed?
Current state	How is the situation handled today? What is working and what is difficult?
Desired outcome	What would a useful result look like? Why does it matter now?
Impact	What does delay, confusion, or the current process cost in time, risk, or opportunity?
Decision	Who is involved? What information or approval is required?
Timing	Is there a real deadline, event, transaction, or dependency?
Fit	What would make a provider or approach the right fit?
Next step	What decision should be made at the end of this conversation?

Prompt	Your Notes
Lead and source	
Important context	
Questions I must ask	
What I heard	
Recommended next step	
Follow-up date	

Qualification Scorecard

Factor	1 - weak	3 - possible	5 - strong	Score
Problem fit	Outside our work	Partly aligned	Directly aligned	
Desired outcome	Unclear	General outcome	Specific and realistic	
Timing	No timing	Future interest	Defined need or deadline	
Decision access	Unknown	Influencer involved	Decision process understood	
Scope and budget	Not aligned	Needs clarification	Aligned with offer	
Delivery capacity	No capacity	Capacity uncertain	Capacity confirmed	
Working fit	Misaligned expectations	Questions remain	Mutual fit is clear	

Prompt	Your Notes
Total score out of 35	
Decision: proceed, nurture, refer, or decline	
Reason	
Next action, owner, and date	

BUSINESS BUILDER TIP

A score supports judgment; it does not replace it. Document exceptions, risks, and professional-review needs.

Proposal and Recommendation Builder

Prompt	Your Notes
Client situation in their words	
Desired outcome and success criteria	
Recommended scope and why it fits	
Deliverables and milestones	
Client responsibilities and assumptions	
What is not included	
Timeline and dependencies	
Investment and payment timing	
Change-request process	
Proof, examples, or qualifications	
Expiration, decision, or next-step date	

BUSINESS BUILDER TIP

Write the recommendation around the client's stated problem and decision criteria. Keep unsupported promises and unnecessary jargon out of the proposal.

Objection Response Library

Concern	Clarify	Respond responsibly	Next question
Price	Is the concern total cost, timing, comparison, or unclear value?	Reconnect scope and outcome; adjust deliverables only if appropriate.	Which part needs the most clarity?
Timing	Is there a real dependency or simply low urgency?	Explain sequence, availability, and consequences without pressure.	What must happen before a decision?
Need to compare	What decision criteria will be used?	Support an informed comparison and restate credible differences.	What information would make comparison easier?
Need approval	Who decides and what do they need?	Provide a concise decision summary or join the next conversation.	Who else should be included?
Not ready	What changed or remains uncertain?	Agree on a respectful nurture or close-the-loop action.	When, if ever, should we revisit?

Prompt	Your Notes
Objection I hear most	
What it may mean	
Evidence or explanation I can responsibly use	
Question I will ask	
When I should decline the work	

Decision and Follow-Up Cadence

Timing	Purpose	Example action	Exit rule
Same day	Confirm understanding and promised material.	Send recap, scope, resource, and agreed next action.	Client asks to pause or no follow-up is appropriate.
2-3 business days	Resolve a specific open question.	Share only the relevant answer, example, or clarification.	Decision is complete.
7 days	Make the decision path easy.	Ask whether to proceed, adjust, refer, or close the loop.	No useful reason to continue.
14-30 days	Nurture only when timing is genuine.	Share one relevant insight and confirm future timing.	Consent changes or timing is indefinite.

DECISION RECAP

Based on our conversation, you are working toward [outcome] and the main concern is [problem]. The recommended next step is [scope] because [reason]. The open question is [question]. I will [action] by [date], and you will [action] by [date].

COMMON MISTAKE

Following up with 'just checking in.' Each message should clarify a decision, answer a question, or provide useful context.

Sales Pipeline and Forecast Tracker

Opportunity	Source	Value	Stage	Confidence	Next action	Owner	Due

Pipeline review	Your answer
Total open value and likely value	
Opportunities with no next action	
Oldest stalled opportunity and decision	
Most productive source	
Capacity risk if all likely work closes	

CHAPTER 10

Design the Client Experience

Turn the promises made in marketing and sales into a consistent, well-communicated delivery experience.

ONBOARD • DELIVER • COMMUNICATE • CLOSE

The Client Journey

Client experience is the complete path from the first promise through delivery, completion, and the next relationship step.

Moment	Client needs	Business evidence
Before the sale	Clarity, credibility, and an appropriate recommendation.	Accurate message and documented scope
At onboarding	Confidence about people, steps, timing, and responsibilities.	Complete intake and kickoff
During delivery	Visible progress and timely explanation of issues.	Milestones and communication record
At completion	Confirmation of work, decisions, and next steps.	Closeout and acceptance
After completion	A respectful way to continue, refer, or provide proof.	Follow-up, testimonial, or referral action

Client Journey Map

Stage	Client action or question	Business action	Owner	Measure or evidence
Discover				
Evaluate				
Decide				
Onboard				
Receive service				
Complete				
Continue or refer				

Prompt	Your Notes
Most important client promise	
Highest-friction moment	
Moment that needs better communication	
One improvement to test	
Owner and completion date	

Onboarding Checklist

Onboarding item	Complete	Owner	Date	Notes or location
Signed agreement and approved scope	☐			
Payment terms or deposit confirmed	☐			
Client contact and decision roles recorded	☐			
Required documents, access, and inputs received	☐			
Timeline, milestones, and dependencies confirmed	☐			
Communication channel and response expectations set	☐			
Risks, exclusions, and professional-review needs noted	☐			
Internal owner and backup assigned	☐			
Kickoff completed and next action scheduled	☐			

QUICK WIN

Send one welcome message that confirms the next three actions, their owners, and their dates.

Client Expectations and Success Profile

Prompt	Your Notes
Client's desired outcome in their words	
Success criteria we can support	
Important deadline or dependency	
Client responsibilities	
Business responsibilities	
Information or access still needed	
Known risks, assumptions, or exclusions	
Preferred communication method	
Decision makers and approval points	
What would create an excellent experience	

COMMON MISTAKE

Assuming the client and delivery team share the same definition of success. Confirm it before work begins.

Client Communication Plan

Moment or trigger	Audience	Message or decision	Channel	Owner	Timing
Welcome and kickoff					
Inputs received or missing					
Milestone completed					
Risk, delay, or change					
Review or approval needed					
Completion and handoff					
Post-service follow-up					

PROGRESS UPDATE

Completed: [work]. Next: [action] by [date]. Needed from you: [input or decision] by [date]. Risk or change: [plain-language explanation]. Please reply to confirm [specific item].

Service Milestone Tracker

Milestone	Definition of done	Owner	Target	Actual	Status	Client notified
						☐
						☐
						☐
						☐
						☐
						☐
						☐

Prompt	Your Notes
Current project or client	
Next milestone	
Dependency or risk	
Decision needed	
Next update date	

Quality Assurance and Completion Checklist

- ☐ Scope and approved changes match the work completed.
- ☐ Required files, records, photos, notes, or reports are complete and stored correctly.
- ☐ Technical work has received the required professional or supervisory review.
- ☐ Open risks, assumptions, exceptions, and limitations are explained clearly.
- ☐ Names, dates, links, calculations, and client details are accurate.
- ☐ The client has received the promised deliverables and next-step instructions.
- ☐ Invoice, payment, or closeout requirements are complete.
- ☐ The internal team understands any follow-up commitment.
- ☐ Sensitive information is retained or disposed of according to policy.

Prompt	Your Notes
Project or client	
Reviewer	
Exceptions found	
Corrections completed	
Client acceptance or evidence	
Close date	

Issue Recovery Plan

1. Acknowledge the concern and document the client's words without arguing.
2. Confirm immediate safety, compliance, or escalation needs.
3. Review scope, evidence, communication history, and responsibilities.
4. Explain what is known, what is not yet known, and when the next update will occur.
5. Offer an appropriate correction, decision, or referral within authority.
6. Confirm the resolution in writing and update the process to prevent recurrence.

Prompt	Your Notes
Issue and date	
Client impact	
Immediate action	
Owner and authority	
Resolution	
Root cause	
Process improvement	

IMPORTANT

Escalate legal, safety, licensing, insurance, privacy, or professional-liability concerns to the appropriate qualified advisor.

Project Closeout and Handoff

Closeout element	Question to answer
Deliverables	What was delivered, where is it stored, and who received it?
Decisions	What was approved, declined, deferred, or referred?
Open items	What remains, who owns it, and by when?
Care or maintenance	What should the client monitor or do next?
Records	What documentation must be retained and for how long?
Team learning	What should change in the process, template, or scope?
Relationship	Is a review, testimonial, referral, renewal, or check-in appropriate?

Prompt	Your Notes
Client or project	
Completion date	
Open commitment	
Owner	
Next relationship action	
Date	

Testimonial, Case Study, and Referral Request

Asset	Ask only when	Permission and context
Testimonial	The client can describe a genuine experience and the work is complete enough to evaluate.	Approve wording, name, role, company, channel, and duration of use.
Case study	The situation, process, and outcome can be explained accurately without exposing private information.	Confirm facts, attribution, images, results, and limitations.
Referral	The client has received value and can identify someone who may have a relevant need.	Make the introduction optional and easy; do not pressure.

PERMISSION-BASED REQUEST

Thank you for trusting us with [work]. If you feel the experience would help others, would you be comfortable sharing a short comment about [specific part]? We will send the proposed wording and use details for your approval before publishing anything.

Prompt	Your Notes
Client or partner	
Appropriate asset	
Specific experience to ask about	
Permission status	
Where it may be used	
Follow-up date	

CHAPTER 11

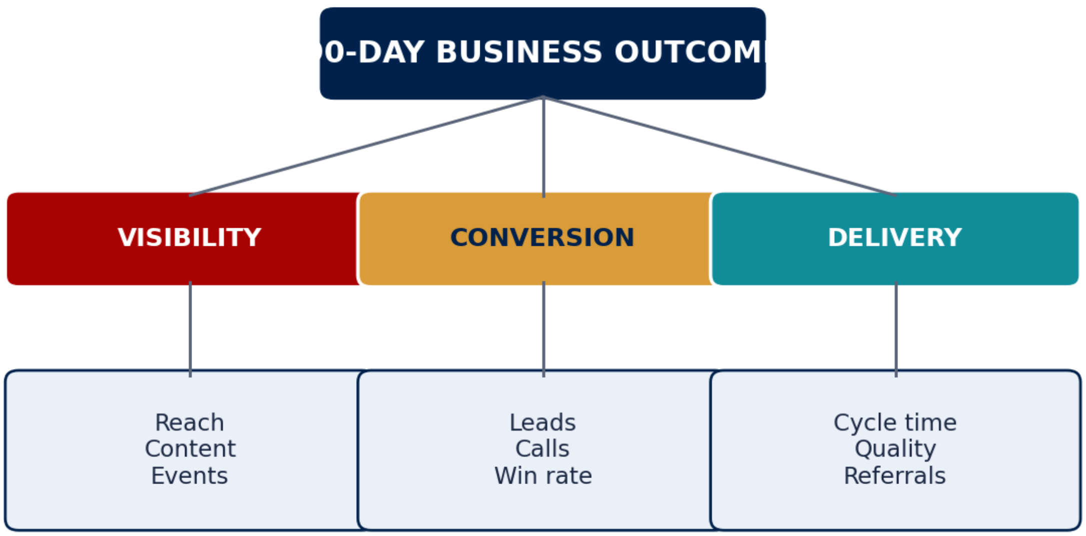
Measure What Drives Decisions

Use a small set of connected measures to understand activity, conversion, delivery, profitability, and the next decision.

ACTIVITY • CONVERSION • QUALITY • PROFIT

Build a Useful KPI Tree

A dashboard should explain what happened and guide a decision—not collect every number a platform can produce.



Track the smallest set of measures that explains progress and guides a decision.

Measure type	Question	Examples
Outcome	What result is the business trying to create?	Revenue, profit, retained clients, owner capacity
Leading activity	What controllable work creates future results?	Outreach, content, partner meetings, follow-up
Conversion	Where does interest move forward or stop?	Capture, conversation, proposal, close
Quality	Is the promise being delivered well?	Timeliness, corrections, satisfaction, completion
Constraint	What limits growth or creates risk?	Capacity, cash timing, bottleneck, dependency

Weekly Business Builder Dashboard

Measure	Target	Actual	Trend	Meaning	Next action
Visibility activity			↑ → ↓		
Partner value actions			↑ → ↓		
New leads			↑ → ↓		
Qualified conversations			↑ → ↓		
Proposals or recommendations			↑ → ↓		
Closed work			↑ → ↓		
Delivery milestones on time			↑ → ↓		
Cash collected			↑ → ↓		
Capacity available			↑ → ↓		

Prompt	Your Notes
One win	

Measure	Target	Actual	Trend	Meaning	Next action
One warning					
One decision					
One owner and deadline					

Marketing and Funnel Dashboard

Stage	Count	Rate	Source or segment	Cost or time	Decision
People reached or invited					
Resource requests or responses					
Leads captured					
Qualified conversations					
Proposals or recommendations					
New clients or projects					
Revenue connected					

- Capture rate = leads captured ÷ people reached or attendees
- Conversation rate = qualified conversations ÷ leads captured
- Close rate = new clients or projects ÷ qualified conversations
- Revenue per lead = connected revenue ÷ leads captured

BUSINESS BUILDER TIP

Compare similar sources and time periods. A small event and a broad social campaign may serve different purposes.

Relationship and Partner Dashboard

Partner	Tier	Last contact	Value given	Value received	Next action	Health
	A / B / C					Green / Yellow / Red
	A / B / C					Green / Yellow / Red
	A / B / C					Green / Yellow / Red
	A / B / C					Green / Yellow / Red
	A / B / C					Green / Yellow / Red
	A / B / C					Green / Yellow / Red
	A / B / C					Green / Yellow / Red

Monthly relationship measure	Target	Actual	Learning
Meaningful conversations			
Introductions or referrals given			
Introductions or referrals received			
Co-marketing actions			

Monthly Financial Dashboard

Measure	Plan	Actual	Variance	Decision or action
Revenue invoiced				
Cash collected				
Direct delivery costs				
Operating expenses				
Owner compensation				
Tax or required reserves				
Operating profit or loss				
Accounts receivable				
Cash reserve				
Committed future work				

IMPORTANT

Definitions, tax treatment, and financial decisions should be reviewed with qualified accounting, tax, or financial professionals.

Monthly Business Review

Prompt	Your Notes
Most important outcome this month	
Evidence of progress	
Strongest lead or revenue source	
Weakest conversion point	
Client-experience or quality signal	
Capacity or cash constraint	
Process that should be documented or improved	
Activity to continue	
Activity to stop	
Decision for next month	
Owner, due date, and evidence	

BUSINESS BUILDER TIP

End every review with a decision. Reporting without a choice does not improve the business.

Business Experiment Tracker

Experiment	Hypothesis	Change	Measure	Start	End	Result	Decision

Prompt	Your Notes
The business problem	
What we believe	
The smallest test	
What will stay unchanged	
Success or stop rule	
Review date	

COMMON MISTAKE

Changing the audience, message, offer, channel, and follow-up at once. Small tests make learning easier.

Decision Log

Date	Decision	Evidence used	Owner	Expected effect	Review date	Outcome

- ◻ What assumption was strongest when the decision was made?
- ◻ What evidence would cause the decision to change?
- ◻ What is reversible, and what requires additional review before acting?
- ◻ When will the outcome be reviewed?

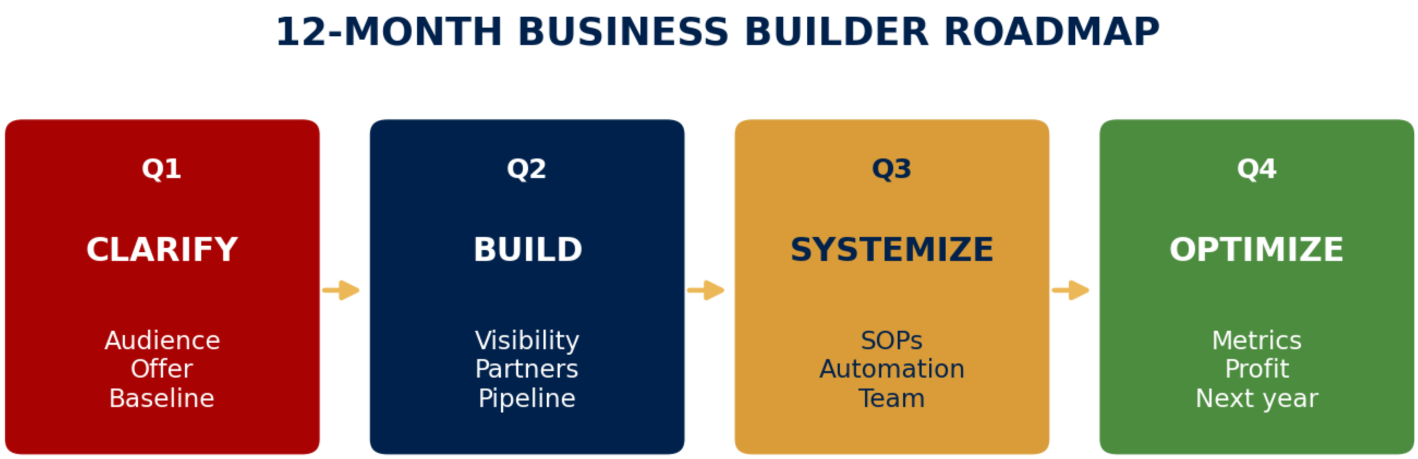
CHAPTER 12

Plan the Next 12 Months

Translate the annual vision into quarterly priorities, campaigns, capacity decisions, investments, and review points.

CLARIFY • BUILD • SYSTEMIZE • OPTIMIZE

The 12-Month Business Builder Roadmap



Quarter	Primary job	Evidence before advancing
Q1 - Clarify	Confirm audience, offer, annual outcomes, baseline measures, and capacity guardrails.	One strategy and measurement plan approved
Q2 - Build	Create consistent visibility, partner, lead, and sales rhythms.	Enough activity exists to identify patterns
Q3 - Systemize	Document delivery, improve automation, and strengthen delegation.	Quality is repeatable beyond the owner
Q4 - Optimize	Review profit, conversion, client experience, capacity, and next-year choices.	Evidence supports the next annual plan

Annual Goal Map

Prompt	Your Notes
One annual business outcome	
Why this outcome matters	
Audience and offer that will drive it	
Revenue, profit, or capacity measure	
Client-experience or quality measure	
Marketing and relationship activity required	
Sales conversion improvement required	
System, team, or technology improvement required	
Largest risk or constraint	
What we will stop or decline	
How success will be reviewed	

BUSINESS BUILDER TIP

Choose one primary outcome and a few supporting measures. A long goal list hides tradeoffs.

Quarterly Planning Page

Planning element	Q1	Q2	Q3	Q4
Primary outcome				
Leading measure				
Major campaign or event				
Partner initiative				
System improvement				
Capacity decision				
Financial decision				
Review date				

Prompt	Your Notes
This quarter's one priority	
Three projects that support it	
Work we will not add	
Owner and review rhythm	

12-Month Campaign Calendar

Month	Audience and campaign	Primary asset	CTA	Partner	Owner	Measure
January						
February						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						

BUSINESS BUILDER TIP

Plan themes and decision dates first. Final creative can be completed closer to launch with current facts and offers.

Capacity and Delegation Map

Work category	Hours or volume	Owner now	Keep	Delegate	Automate	Stop	Next decision
Marketing			☐	☐	☐	☐	
Sales and follow-up			☐	☐	☐	☐	
Client onboarding			☐	☐	☐	☐	
Core delivery			☐	☐	☐	☐	
Quality review			☐	☐	☐	☐	
Administration			☐	☐	☐	☐	
Finance and reporting			☐	☐	☐	☐	

Prompt	Your Notes
Current capacity constraint	
Work only the owner should do	
First process to delegate	
First process to simplify or automate	
Quality control required	
Decision date	

Growth Investment Planner

Investment	Business problem	Expected effect	Total cost	Owner time	Measure	Decision date

Prompt	Your Notes
Investment we should make	
Investment we should delay	
What must be true before approval	
Cash or capacity impact	
Review with qualified advisor	

COMMON MISTAKE

Buying software, services, or advertising without a defined process, owner, adoption plan, and success measure.

Annual Risk Register

Risk	Likelihood	Impact	Early signal	Prevention	Response owner	Review
	Low / Med / High	Low / Med / High				
	Low / Med / High	Low / Med / High				
	Low / Med / High	Low / Med / High				
	Low / Med / High	Low / Med / High				
	Low / Med / High	Low / Med / High				
	Low / Med / High	Low / Med / High				

- ☐ Client concentration or referral-source concentration
- ☐ Capacity, key-person, or vendor dependency
- ☐ Cash timing, receivables, or unplanned expense
- ☐ Contract, licensing, privacy, insurance, or regulatory change
- ☐ Quality, reputation, or communication failure

Year-End Review and Next-Year Decision

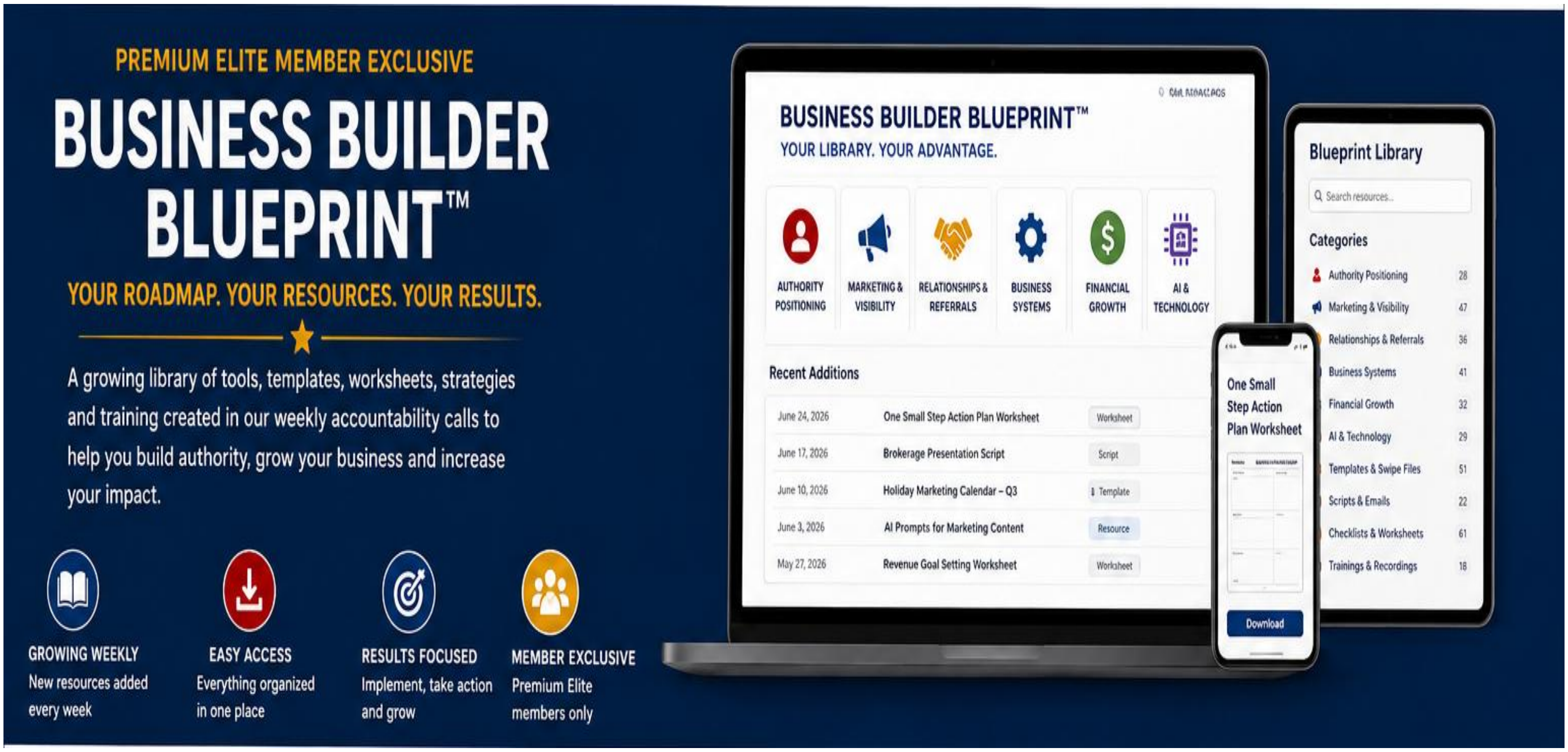
Prompt	Your Notes
Most important result this year	
Most productive audience, offer, or relationship	
Marketing activity that created useful conversations	
Sales conversion lesson	
Client-experience improvement	
System or delegation improvement	
Profit, cash, or capacity lesson	
Experiment to continue	
Activity or offer to stop	
Risk that needs a plan	
Next year's one primary outcome	
First 30-day action	

BUSINESS BUILDER TIP

Record what changed because of the year—not only what happened. Carry the strongest evidence into the next plan.

The Living Business Builder Blueprint Library

This Blueprint is a comprehensive operating field guide. Premium Elite is designed as the growing implementation library.



Primary category	Examples
Authority Positioning	Positioning statements, elevator pitches, brand and authority tools
Marketing and Visibility	Calendars, campaigns, content, social media, outreach
Relationships and Referrals	Partner strategies, contractor and lender relationships, community connections
Business Systems	Planning, accountability, goals, processes, productivity
Financial Growth	Revenue planning, pricing, budgeting, profit tools
AI and Technology	Prompts, automation, content systems, tool training
Templates, Scripts, and Training	Editable assets, emails, checklists, recordings, workshops

Verified Tools and Resource Links

Links were checked against official sites on July 20, 2026. Platform features and pricing may change.

Resource	Use	Official Link
NAFHAC	Professional association, education, membership, and FHA consultant resources.	Open resource
HUD 203(k) Consultant Lookup	Official HUD search for 203(k) consultants.	Open resource
HUD Single Family FHA Resource Center	Official FHA Single Family policy and update resources.	Open resource
Systeme.io	Funnels, email, automation, and CRM workflows discussed in the coaching sources.	Open resource
Mobex Pro	Mobile lead capture and follow-up platform discussed in the coaching sources.	Open resource
Gamma	Presentation and content creation tool used with the PSC framework.	Open resource
Canva	Design tool for branded graphics, documents, and video assets.	Open resource
Zoom	Meetings, webinars, recording, and team communication.	Open resource
Eventbrite	Public event discovery, registration, and event promotion.	Open resource
ChatGPT	AI assistant for drafting, analysis, planning, and repurposing with human review.	Open resource

Resource Directory

Category	Resource to attach
Authority Positioning	June 2, 2026: Positioning Yourself as a Property Condition and Renovation Solution Specialist
	June 24, 2026: Building Authority Through Press Releases, Charity Networking, and Strategic Events
	May 26, 2026: Competitive Analysis: Finding Your Market Gap and Building Authority
	NAFHAC Five-Step Market Analysis Challenge (PDF)
	How Real Estate Pros Are Turning FHA Minimum Property Standards into New Revenue (PDF)
	Brokerage Open Door Presentation
Marketing & Visibility	April 7, 2026: Tax Season Essentials and Event-Based Marketing Strategies
	May 19, 2026: Short-Form Video Marketing for Greater Reach and Engagement
	June 30, 2026: Mobex Pro: Automating Lead Capture and Follow-Up
	30-Day Action Roadmap (PDF)
	52 Prewritten Short-Form Video Resources
	Brian Ivan's Video Review Offer
	Zoom Background with Book, Logo & QR Code Template
	CEO Summit VIP Guest Invitation Program
Relationships & Referrals	March 31, 2026: Marketing Partners: Building Reciprocal Referral Relationships
	April 21, 2026: Authority Building, Marketing Partnerships, and Automated Follow-Up
	July 14, 2026: Christmas in July: Strengthening Referral Partner Relationships
	July 21, 2026: Strategic Audience Building: Finding New Markets and Securing Speaking Opportunities

Category	Resource to attach
	Marketing Partner Outreach and Cross-Marketing Strategy (PDF)
	HUD Consultant Outreach Script – Client Benefits (PDF)
Lead Generation & Sales	March 10, 2026: Market Trends, HUD Recertification, and Rehab Lead Conversion
	March 24, 2026: Process Over Probability: Building a Repeatable Lead-Generation System
	June 16, 2026: The PSC Presentation Framework: From Problem to Solution to Action
	Inspection-to-Rehab Lead Conversion Workflow (PDF)
	Initial Conversation Framework (PDF)
	PSC Presentation Framework (PDF)
	PSC Presentation Framework Cheat Sheet (PDF)
	PSC Presentation Framework Presentation
Business Systems & Productivity	July 7, 2026: Midyear Business Review and the Business Builder Blueprint Library
	30-Day Action Roadmap (PDF)
AI & Technology	Catherine Hall AI
	Real Estate Prospecting Assistant
	Mobex Pro
	AI Presentation Creation Workflow
Templates, Frameworks & Playbooks	30-Day Action Roadmap
	PSC Presentation Framework
	PSC Presentation Framework Cheat Sheet
	Five-Step Market Analysis Challenge
	Inspection-to-Rehab Lead Conversion Workflow
	Marketing Partner Outreach Strategy
	HUD Consultant Outreach Script
	Initial Conversation Framework
FHA & Renovation Resources	NAFHAC Rehab Loan Guide (PDF)
	How Real Estate Pros Are Turning FHA Minimum

Category	Resource to attach
	Property Standards into New Revenue (PDF)
Business Building Tools & Member Resources	Featured Author Digital and Physical Books
	NAFHAC Featured Author Book Order Page
	MPS Reporting System
	CEO Summit VIP Guest Invitation Program
	Catherine Hall AI
	Zoom Background with Book, Logo & QR Code Template

2026 Premium Elite Business Coaching Calls

Date	Topic Coverage
March 10 coaching	Market Trends, HUD Recertification, and Rehab Lead Conversion
March 24 coaching	Process Over Probability: Building a Repeatable Lead-Generation System
March 31 coaching	Marketing Partners: Building Reciprocal Referral Relationships
April 7 coaching	Tax Season Essentials and Event-Based Marketing Strategies
April 21 coaching	Authority Building, Marketing Partnerships, and Automated Follow-Up
May 19 coaching	Short-Form Video Marketing for Greater Reach and Engagement
May 26 coaching	Competitive Analysis: Finding Your Market Gap and Building Authority
June 2 coaching	Positioning Yourself as a Property Condition and Renovation Solution Specialist
June 16 coaching	The PSC Presentation Framework: From Problem to Solution to Action
June 24 coaching	Building Authority Through Press Releases, Charity Networking, and Strategic Events
June 30 coaching	Mobex Pro: Automating Lead Capture and Follow-Up
July 7 coaching	Midyear Business Review and the Business Builder Blueprint Library
July 14 coaching	Christmas in July: Strengthening Referral Partner Relationships
July 21 coaching	Strategic Audience Building: Finding New Markets and Securing Speaking Opportunities

Notes and Decisions

IDEAS TO TEST

PEOPLE TO CONTACT

RESOURCES TO CREATE

DECISIONS TO MAKE

NEXT REVIEW

YOUR ROADMAP. YOUR RESOURCES. YOUR RESULTS.

The Business Builder Blueprint gives you a practical system for positioning, marketing, relationships, sales, delivery, measurement, and sustainable growth.

READY TO KEEP BUILDING?

Explore ongoing tools, training, templates, accountability, and implementation support inside the Premium Elite Library.

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DON'T JUST WORK IN YOUR BUSINESS.
BUILD THE BUSINESS THAT GIVES YOU FREEDOM.