

STUART PRESTON, MYBUSINESS ADVISORS INC, PRESENTS:



THE

GUIDING YOUR

SMALL BUSINESS

TO SUCCESS

WORKBOOK



A PRACTICAL,  
HANDS-ON  
APPROACH  
TO SUCCESS  
FOR YOUR  
SMALL  
BUSINESS



**FEATURING:**

- Self-directed Audio Program
- Simple, Easy To Follow Planning Tools
- Annual Business Planner



**BONUS MATERIAL:**

“Do You Have What it Takes  
to Succeed?” Audio book



# CONTENTS

## WELCOME

Introduction ..... 8  
 How To Use This Book..... 9

## DISC ONE: GET FOCUSED

Get Focused ..... 11  
 Disc 1: Track 1: Introduction..... 12  
 Disc 1: Track 1: Introduction..... 12  
 Disc 1: Track 2: Get Focused Introduction ..... 14  
 Disc 1: Track 3: Passion..... 14  
 Disc 1: Track 4: Vision ..... 16  
 Disc 1: Track 5: Resolve ..... 16  
 Disc 1: Track 6: What Business Are You In? ..... 18  
 Disc 1: Track 7: Mission Statement..... 18  
 Disc 1: Track 7: Mission Statement..... 20  
 Disc 1: Track 7: Mission Statement..... 20  
 Disc 1: Track 7: Mission Statement..... 22  
 Disc 1: Track 8: SWOT-T Analysis..... 22  
 Disc 1: Track 9: Your Story ..... 24  
 Disc 1: Track 10: Conclusion ..... 24

## YOUR EXERCISES:

Get Focused ..... 26



## DISC TWO: MARKETING

Marketing .....	31
Disc 2: Track 1: Marketing Introduction .....	32
Disc 2: Track 2: Target Market .....	32
Disc 2: Track 3: Market Segments.....	34
Disc 2: Track 4: Product Mix.....	34
Disc 2: Track 5: Promotional Plan .....	36
Disc 2: Track 6: Benefit Analysis.....	36
Disc 2: Track 7: The Competition .....	38
Disc 2: Track 8: Marketing Conclusion.....	38

### YOUR EXERCISES:

Marketing Plan .....	40
----------------------	----

## DISC THREE: SALES

Sales.....	45
Disc 3: Track 1: Sales Introduction.....	46
Disc 3: Track 2: Selling to Current Customers .....	46
Disc 3: Track 2: Selling to Current Customers .....	48
Disc 3: Track 2: Selling to Current Customers .....	48
Disc 3: Track 2: Selling to Current Customers .....	50
Disc 3: Track 3: Finding Prospects.....	50
Disc 3: Track 4: Finding Prospect Lists.....	52
Disc 3: Track 5: Making the Calls .....	52
Disc 3: Track 6: The Sales Call .....	54
Disc 3: Track 7: The Cold Call .....	54
Disc 3: Track 8: The Sales Meeting .....	56
Disc 3: Track 8: The Sales Meeting .....	56
Disc 3: Track 9: Tracking Results.....	58
Disc 3: Track 10: Sales Conclusion.....	58



**YOUR EXERCISES:**

Your Exercises: Sales Plan..... 60

**DISC FOUR: CASH FLOW**

Cash Flow ..... 67

Disc 4: Track 1: Cash Flow Introduction ..... 68

Disc 4: Track 2: Increasing Cash Flows ..... 68

Disc 4: Track 3: Three Cash Flow Mistakes ..... 70

Disc 4: Track 4: Profit and Loss Statement..... 70

Disc 4: Track 4: Profit and Loss Statement..... 72

Disc 4: Track 5: The Budget ..... 72

Disc 4: Track 6: Key Metrics ..... 74

Disc 4: Track 7: Cash Flow Review ..... 74

**YOUR EXERCISES:**

Financial Plan..... 76

**DISC FIVE: GOALS**

Goals ..... 79

Disc 5: Track 1: The Big Picture Goal ..... 80

Disc 5: Track 2: Setting Goals..... 80

Disc 5: Track 3: Prioritize Your Goals ..... 82

Disc 5: Track 4: Goals to Tasks..... 82

Disc 5: Track 5: Action Plans ..... 84

**YOUR EXERCISES:**

Your Exercises: Goals ..... 86



## **DISC SIX: THE DASHBOARD**

The Dashboard.....	89
Disc 6: Track 1: The Dashboard.....	90
Disc 6: Track 2: Dashboard Goals .....	90
Disc 6: Track 3: Dashboard Metrics .....	92
Disc 6: Track 4: Dashboard Promotions .....	92

## **ANNUAL BUSINESS PLANNER**

Annual Business Planner .....	95
-------------------------------	----





## INTRODUCTION

Thank you for purchasing this package. My business exists to bring real, usable information to small business owners like you. That is what you will find in this program: real, usable information. So, I thank you very much for placing your time, money, and trust into this workbook.

This program has been years in the making. I could say that I started to develop it when I first started MyBusiness Advisors, Inc., but it really started well before that. After closing the doors on my first business over a decade ago, I became a man on a mission – to find out what it takes to run a successful business. I made it a focus of everything I did. I wanted to learn this in order to help other small business owners avoid the mistakes I made.

In the process, I ended up getting an MBA, a graduate certificate in Entrepreneurship, owning two more companies, and, eventually, starting a consulting business. Along the way, I gathered a bag of tools that have proven invaluable to my small business clients:

1. THE DASHBOARD
2. A SYSTEM TO IDENTIFY AND SET GOALS
3. THE KEY EXERCISES TO ESTABLISH A STRONG COMPETITIVE STRATEGY
4. A PROVEN SALES SYSTEM
5. THE HEART AND SOUL OF A GOOD MARKETING PLAN

I have delivered these tools to my clients through one-on-one consulting. I have also taught these concepts to the hundreds of entrepreneurs who have attended my workshops and seminars. Each time a company has gone through the process, we have both gotten better at our businesses. They have developed a new focus on the success of their business, while I have been able to benefit from their ideas and input into the program. The result is the system you have before you – a simple, proven program to help you get on track to run the company of your dreams.



## HOW TO USE THIS BOOK



Accompanying this book are a set of six compact discs (CD), one for each chapter. The audio portion of the program is divided into two sections: Seminar and Exercises.

Each chapter begins with a general seminar-type presentation that gives you a good background on the general topics of the workbook: Focus, Marketing, Sales, Cash Flows, Goals, and the Dashboard. As you listen to the seminar, you can take notes in the notes space provided with each slide.



The second section of each chapter is the exercises. The final 'Track' on each CD will walk you through these exercises. Many of the concepts covered in the seminar portion of the audio will be reiterated in order to help you through the exercises. You will want to pause the audio when instructed so that you can spend time working on the current exercise.

