



# ENTREPRENEUR CURRICULUM

## Session 2

For more information, visit  
[www.whcusa.com](http://www.whcusa.com) or email

Will Holmes at [will@whcusa.com](mailto:will@whcusa.com)



# Agenda

## Learning Session 2

Facilitator: Will Holmes



**1**

**Welcome**

**2**

**Presentation: Developing a Sustainable Business Model**

**3**

**Panel Discussion**

**4**

**Q&A, Wrap Up and Homework Reminder**



# What's Your 1yr., 3yr., 5yr. & Exit Strategy?

Will your pricing, scalability, profitability and valuation support your plan?

## Lifestyle

Next 5 years?

What do you need to live more comfortably now? Scalability? Work/Life Balance? Retirement? Travel? Access to Capital? Freedom?

## Long-Term

5 to 20 years?

How do you envision your later years? Still working? Valuation? Sell the business? Home? Health care? Help day-to-day?

## Legacy

Retirement & After Death?

Insurance? Investments? Estate Planning? Will? Heirs? Long-term ownership for your company? Comfort of your family?



# What can you offer the market that meets a need and gets you to your profitability goal?

**What can you offer the market that will support your profit goal?**

Your Value Proposition,  
Cash Flow Projections,  
Access to Capital, Your  
Team?

**Chaos/ Need in Your Target Industries/ Market/ Community**

Market Research, High  
Value Opportunities,  
Interviews/ Focus Groups,  
Reinvestment in Your Infrastructure

**Issues That Enough People Will Pay/ Support You to Fix Now**

Where is the pain? Where is the pleasure? What are customers needing now?



# Is Your Mission Sustainable & Scalable?

## 7 Considerations

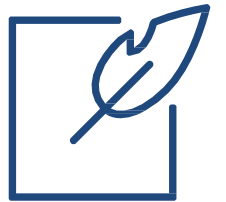
- 1** What do you know/ do better than anyone?

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- 2** What is your unfair advantage? Moat? Stand out? Relationships?

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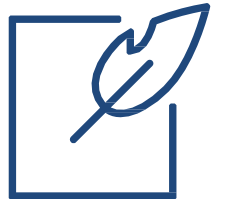
- 3** What is your target industry or target issue? Marketing Demographics? Short-term and/or long-term opportunities? Is there enough money in the industry and for how long?



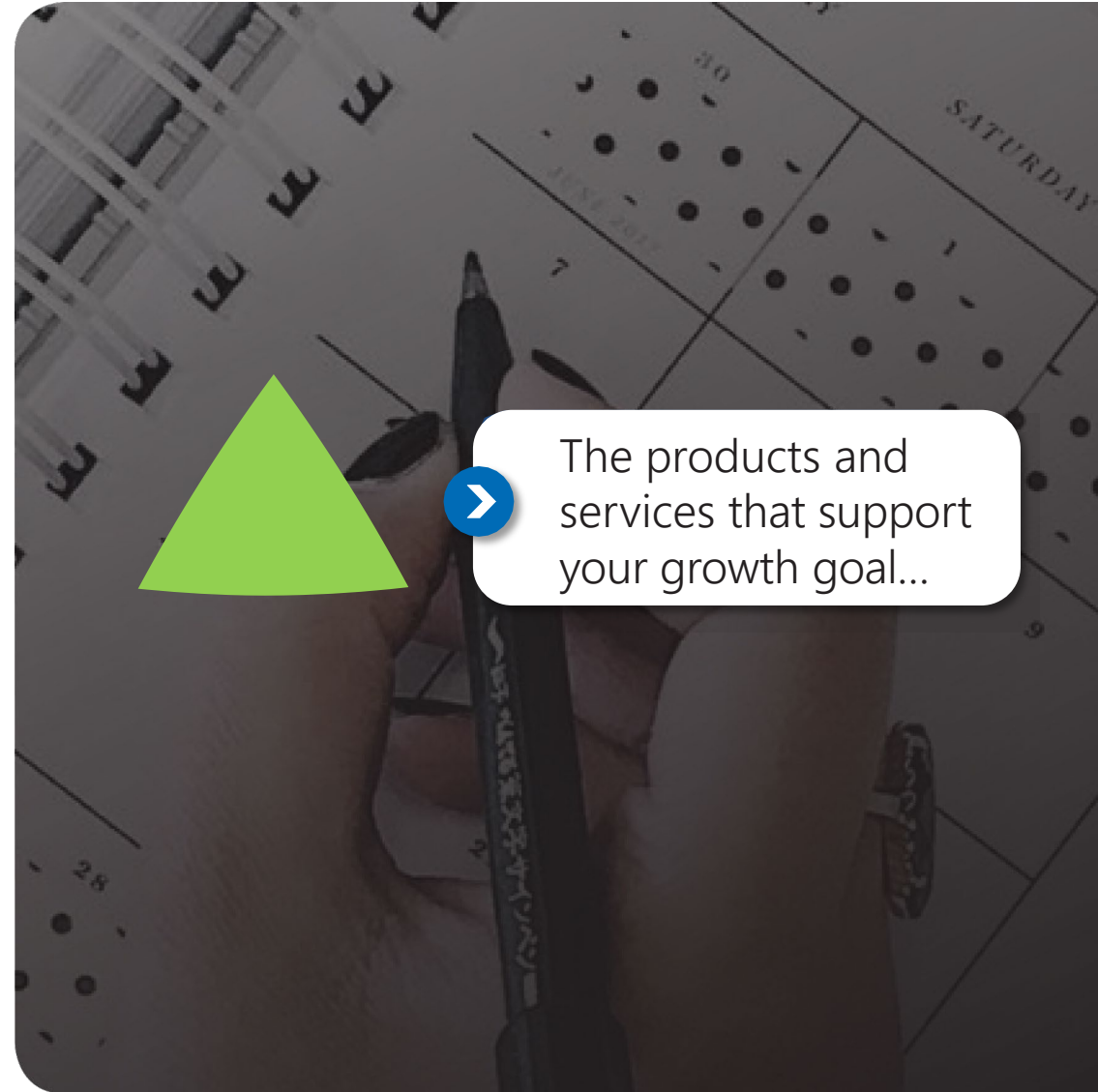
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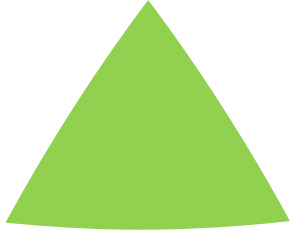
- 4 Where is there chaos in your target area? Void? Need? Broken/ inadequate solutions?
- 5 Who has money and wants to fix the chaos? Whom do you target?
- 6 What do they want to fix right now? Talk to customers.
- 7 What services can you guarantee? The overlap of circles?



# What Will You Offer?

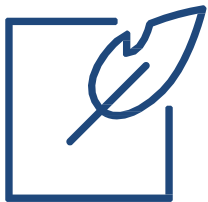


# Defining Your Mission



Out of the products and services you can possibly offer, you should consider what services you can guarantee, based on:

- Your Knowledge and Abilities (In real life...)
- Your Budget and Cash Flow (Do you have sufficient capital?)
- Your Time (Balance your life with business development!)
- Your Team/ Staffing (Different jobs/ different rates/ delegation)
- Where you can make the most money! Who has it?
- What allows you to manage the business and not work in it...



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**Where will you be happiest? What business model supports the life you want?  
Do you have the right customers? Do you charge enough?**





# Are You Charging Enough?

Are you charging enough? Are you including ALL the costs associated with making this cupcake? Do you know your REAL cost per item? What will your customer pay? Do you need new customers who will pay more?

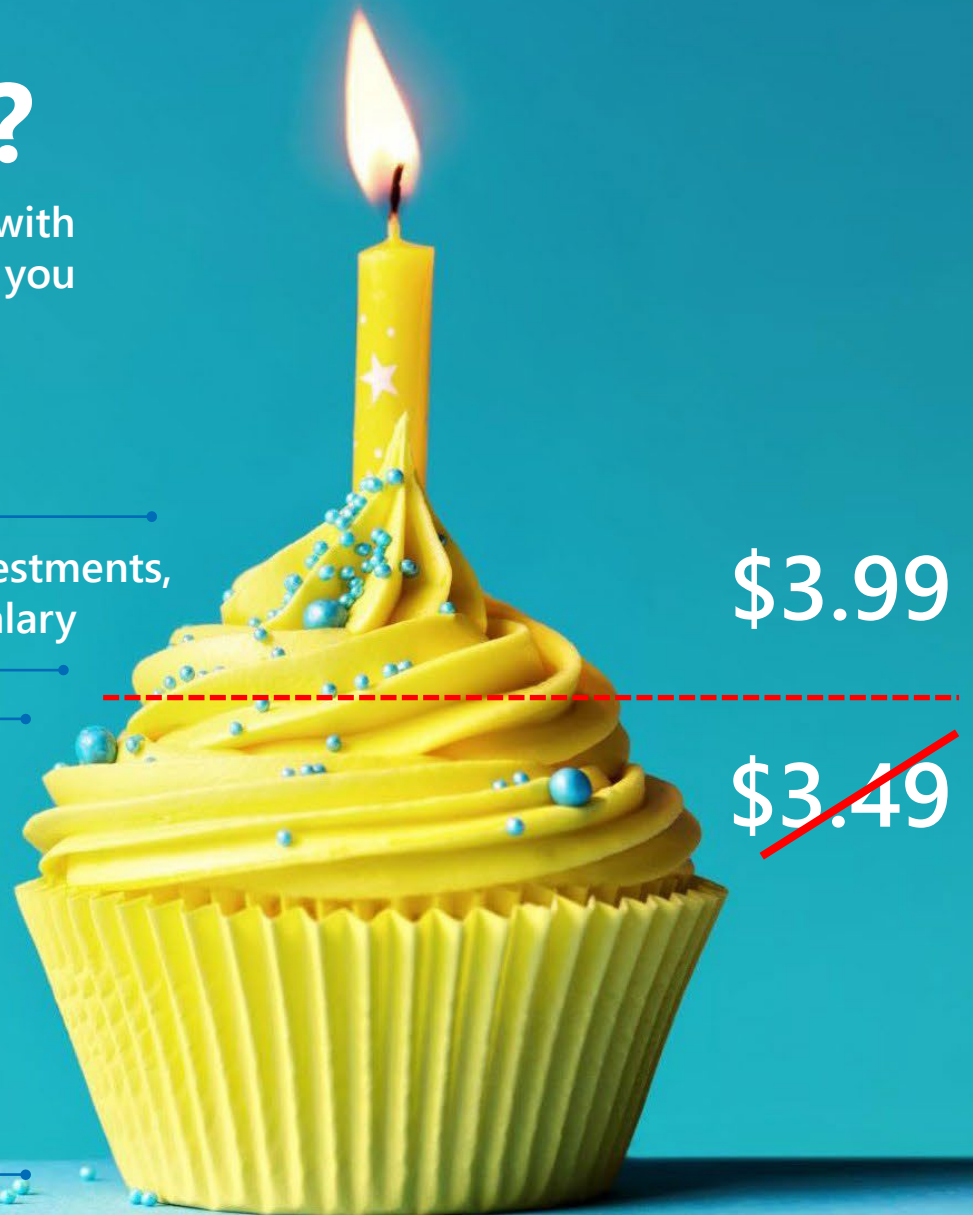
Obviously, there is the cost of the ingredients. But what about:

- Labor?
- Marketing? Sales?
- Utilities? Accountant?
- Rent? Technology?
- Recruiting & training?
- Reinvesting into the business?
- Paying yourself? Your profit?
- Your savings/ investments?
- Retirement? Vacations?

Profit, Savings, Investments, Retirement, Your Salary

Next month's expenses

This month's expenses



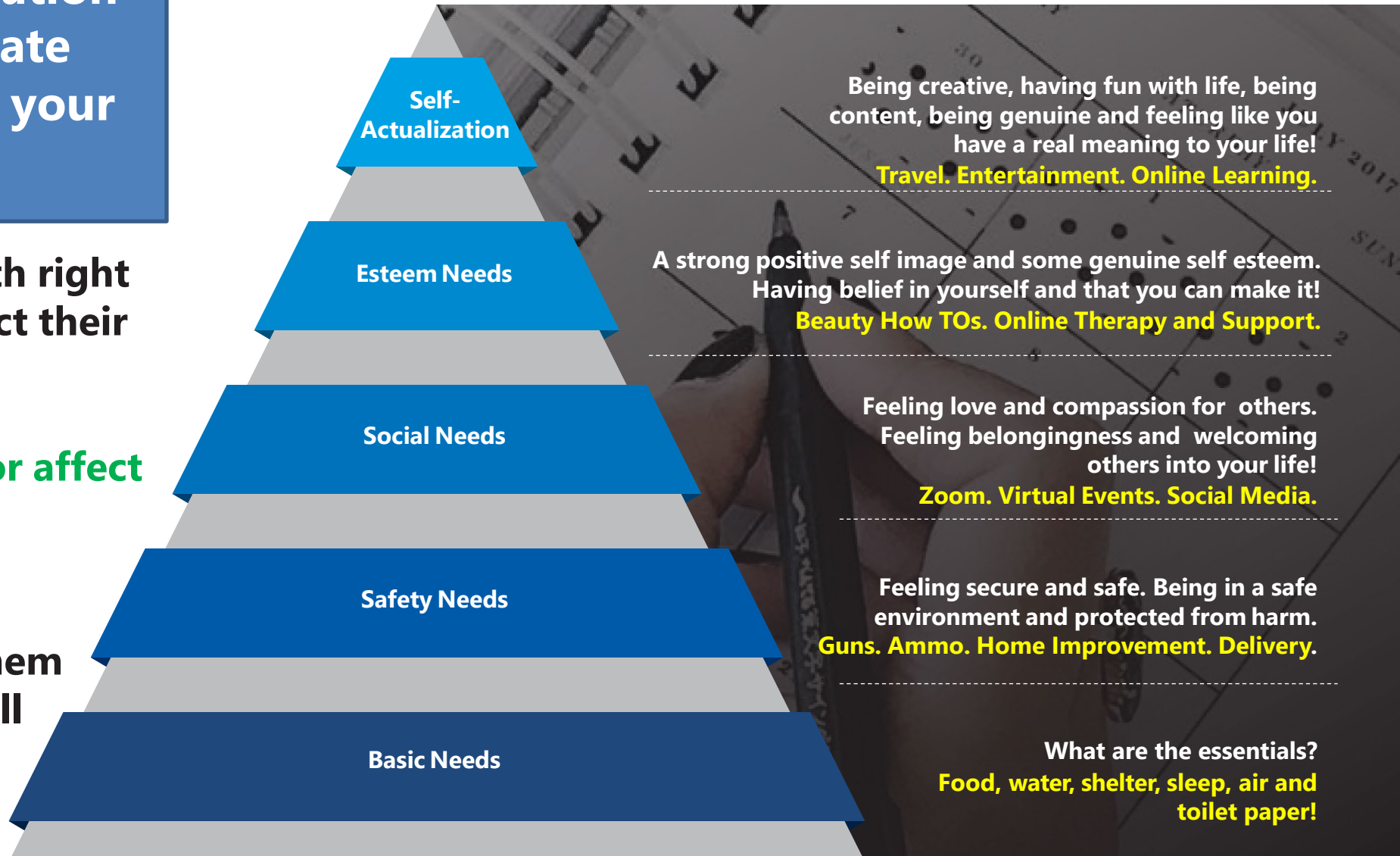
**A sustainable organization needs sales! To generate sales, you must know your customer's needs.**

**What are they dealing with right now and how does it affect their buying behavior?**

**How does buying behavior affect your business and related industries?**

**When there is stress on them or on the system, what will your customers do?**

*Source: Maslow's Hierarchy of Needs*



# Scaling Your Business

Do. Delegate. Duplicate. Deliver. Repeat.

- At first, it's just you doing everything. But you are the bottleneck. You are limited by your time, your knowledge, your capital and your abilities. This may be all you can afford now, but you realize that you must **do** more in order to scale your business.
- Define your hourly rate based on your personal revenue goal. How much do you want to make this year? Divide by 2080. That's the level of work for you. Nothing less. Only "Boss Level" tasks.
- Stop and define the tasks associated with your business. Create SOPs. Identify the skill sets needed and the market rate for the labor. Determine your recruiting cycle. Use your 12-month cash flow to create your fast/ slow growth plan budgets. Define your budget for growth!
- Use your cash flow to explain your "ask" for your line of credit or bank loan. Apply to see what you qualify for. If denied, use their checklist to address your creditworthiness. **Delegate** based on what you can afford. Normally, the first hire is Admin. **Duplicate** your efforts systematically. **Deliver** your products and services at the highest level in order to win and keep customers. **Repeat.**



# If you're not ready to trust the people, build a process you can trust.

**Trust the process but monitor it to ensure that it, and the team, are operating efficiently.**

You want to trust your people but your fear of letting go is slowing growth. Build a better process with less room for error and metrics to monitor performance. They will never love it like you do.

**Set metrics based on past performance with the expectation of hitting new company targets.**

Growth is key for any business. Your team needs to know that they are accountable, the goals are attainable and important to the sustainability of the company.

**If people aren't adhering to the process and hitting set goals, it's time for a change.**

When retraining and feedback aren't enough, if you can't change the people you have to change the people. Build a recruitment process that lets you confidently make changes as needed.



# What should you do as the Owner?

Besides monitor cash flow, sales, expenses, resources and capital...

**Look for opportunities for innovation and greater profitability within your company.**

You should know the cost of doing business and understand that by reducing costs and efficiently filling customer needs, your customer is happier, and profits are higher.

**Look for immediate or upcoming needs in the market that can be filled by your team.**

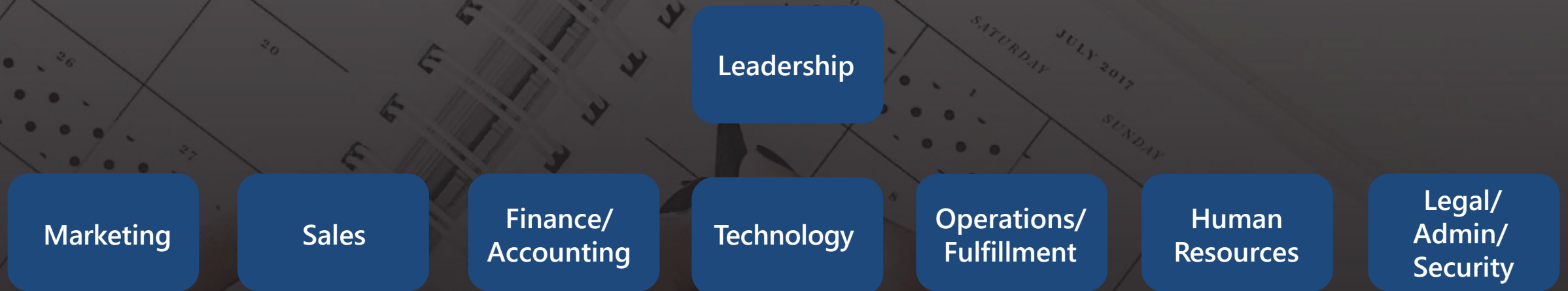
You should be looking for what's next in your industry and ensuring that customers want it, need it and will pay you for the solution to their pain points. Manage your emotions!

**Build internal and external relationships that will bring future returns.**

Lead your team and build trust with delegation and mentoring. Protect your time. Find and create relationships that will build the brand now and pay off later. Network with a purpose.



# Remember These Key Business Functions!!!



Every business needs these functions, no matter how big or small. Some roles may be filled with technology.

**You must segregate duties and put people in roles where they will thrive! Create Job Descriptions and Standard Operating Procedures. Develop a consistent training program! Allow for innovation!**

Let's discuss how these roles work together...



➤ **Leadership** - You are Leadership. It's all on you. You set the goals and give assignments. You have to innovate to grow. Always thinking about how we can make it happen. Motivator. You must take responsibility for everything that happens around you.

➤ **Marketing**- What's the purpose? You need Sales to get paid! Your marketing team needs to focus on generating sales, not likes. Pay attention. Don't waste money. Generate high quality, qualified leads.

➤ **Sales** - They have a direct relationship to how much your customers will spend. There are different sales roles in different industries, but they need to know how to convert leads. Your technology should help manage the leads.

➤ **Finance/ Accounting** - Make sure that AR is timely so we can pay people. Make sure AP is fast so we can get resources so we can make money. Help with accessing capital and ensures taxes and fees are paid correctly.

➤ **Technology** - Your tech should not limit your business. It should support how you want to grow. How can we make it do what we need so we can make money faster?



- **Operations/ Fulfillment** - Broad and all industries vary here. What is your fulfillment process? Simple or complicated? If we don't operate efficiently no one gets paid. Pricing.
- **HR** - If they hire/train the wrong people the company is going to fail. HR needs feedback regularly. They should adhere to proper guidelines, laws and partner with accounting.
- **Legal** - Save yourself a lot of trouble in the future. Find a business attorney and get your contracts and business entity in order early.
- **Admin** - Hire a virtual assistant. Buy some time and get 10 hours of your life back and focus on being a leader, or go to sleep, or spend time with family. Go do what you want.
- **Security** - Keep your self, data, property and team safe.

**These functions needs to be addressed in your cash flow projections and pricing!**





# 12 Month Cash Flow Forecast

- Use this to plan big profits and you eventually not doing the work!!!
- Your pay & retirement. Inflation.
- Big or Small Company? Team?
- Milestones for Capacity Building
- Conservative Revenue
- Savings Plan? Investing Plan?
- Your ask for a loan/ line of credit and its repayment
- All included in your pricing!!!

## Cash Flow Forecast - 12 Months

Month:	Pre-Start	1	2	3	4	5	6	7	8	9	10	11	12	Totals
<b>Receipts</b>														
Cash sales	0	0	10,020	10,855	12,525	14,195	15,865	18,370	21,710	24,215	26,406	28,808	33,066	216,035
Collections from credit sales	0	0	0	251	418	501	501	585	752	752	1,002	1,002	1,166	6,930
New equity inflow	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Loans received	0	16,700	0	0	8,350	0	0	8,350	0	0	8,350	0	0	41,750
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Receipts</b>	<b>0</b>	<b>16,700</b>	<b>10,020</b>	<b>11,106</b>	<b>21,293</b>	<b>14,696</b>	<b>16,366</b>	<b>27,305</b>	<b>22,462</b>	<b>24,967</b>	<b>35,758</b>	<b>29,810</b>	<b>34,232</b>	<b>264,715</b>
<b>Payments</b>														
Cash purchases	0	401	326	166	131	237	166	149	149	166	113	113	167	2,284
Payments to creditors	0	1,203	978	499	392	713	499	446	446	499	339	339	503	6,856
Salaries and wages	0	6,304	5,120	2,620	2,058	3,728	2,620	2,336	2,336	2,620	1,780	1,780	2,631	35,933
Employee benefits	0	3,152	2,560	1,310	1,029	1,864	1,310	1,168	1,168	1,310	890	890	1,315	17,966
Payroll taxes	0	1,051	853	437	343	621	437	389	389	437	297	297	438	5,989
Rent	0	5,253	4,267	2,183	1,715	3,107	2,183	1,947	1,947	2,183	1,483	1,483	2,192	29,943
Utilities	0	1,021	830	425	333	604	425	379	379	425	288	288	426	5,823
Repairs and maintenance	0	584	474	243	191	345	243	216	216	243	165	165	244	3,329
Insurance	0	1,021	830	425	333	604	425	379	379	425	288	288	426	5,823
Travel	0	1,240	1,007	515	405	734	515	460	460	515	350	350	518	7,069
Telephone	0	1,043	847	434	341	617	434	387	387	434	295	295	435	5,949
Postage	0	438	358	182	143	259	182	162	162	182	124	124	183	2,499
Office supplies	0	949	770	394	310	561	394	352	352	394	268	268	396	5,408
Advertising	0	6,938	5,635	2,883	2,265	4,103	2,883	2,571	2,571	2,883	1,959	1,959	2,895	39,545
Marketing/promotion	0	5,439	4,418	2,261	1,776	3,217	2,261	2,016	2,016	2,261	1,536	1,536	2,270	31,007
Professional fees	0	1,751	1,422	728	572	1,036	728	649	649	728	494	494	731	9,982
Training and development	0	26	21	11	9	16	11	10	10	11	7	7	11	150
Bank charges	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Miscellaneous	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Owner's drawings	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Loan repayments	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tax payments	0	25,050	0	4,175	0	0	0	0	0	0	0	0	0	29,225
Capital purchases	0	0	0	0	10,000	0	0	10,000	0	0	21,325	0	0	41,325
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Payments</b>	<b>0</b>	<b>62,864</b>	<b>30,716</b>	<b>19,891</b>	<b>22,346</b>	<b>22,366</b>	<b>15,716</b>	<b>24,016</b>	<b>14,016</b>	<b>15,716</b>	<b>32,001</b>	<b>10,676</b>	<b>15,781</b>	<b>286,105</b>
<b>Cashflow Surplus/Deficit (-)</b>	<b>0</b>	<b>(46,164)</b>	<b>(20,696)</b>	<b>(8,785)</b>	<b>(1,053)</b>	<b>(7,670)</b>	<b>650</b>	<b>3,289</b>	<b>8,446</b>	<b>9,251</b>	<b>3,757</b>	<b>19,134</b>	<b>18,451</b>	<b>(21,390)</b>
<b>Opening Cash Balance</b>	<b>0</b>	<b>0</b>	<b>(46,164)</b>	<b>(66,860)</b>	<b>(75,645)</b>	<b>(76,698)</b>	<b>(84,368)</b>	<b>(83,718)</b>	<b>(80,429)</b>	<b>(71,983)</b>	<b>(62,732)</b>	<b>(58,975)</b>	<b>(39,841)</b>	<b>(747,413)</b>
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# 12 Month Cash Flow Forecast

- Do you need investors to help you raise capital? What are you willing to give?
- Are you spending your money? Will you wish for that liquid cash later? Is financing a smarter option?
- Use your lines of credit to infuse cash when you need it and use your credit cards strategically to make payments while you get points and delay using your cash.

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# 12 Month Cash Flow Forecast

- Healthy spending budget!
- Employees and associated fees?
- Business Insurance? WC? UI?
- Materials, time, labor, marketing costs, taxes, fees, normal business purchases, maintaining existing inventory, packaging, transportation, distribution, office, utilities, reinvestment...???
- Mixing business and personal?
- Loan repayment term? Other debt.
- Plan for SOPs, admin, growth, hiring and more infrastructure!!!
- Tax planning for deductions, retirement, and investments!!!

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Insurance	0	1,021	830	425	333	604	425	379	379	425	288	288	426	5,823
Travel	0	1,240	1,007	515	405	734	515	460	460	515	350	350	518	7,069
Telephone	0	1,043	847	434	341	617	434	387	387	434	295	295	435	5,949
Postage	0	438	358	182	143	259	182	162	162	182	124	124	183	2,499
Office supplies	0	949	770	394	310	561	394	352	352	394	268	268	396	5,408
Advertising	0	6,938	5,635	2,883	2,265	4,103	2,883	2,571	2,571	2,883	1,959	1,959	2,895	39,545
Marketing/promotion	0	5,439	4,418	2,261	1,776	3,217	2,261	2,016	2,016	2,261	1,536	1,536	2,270	31,007
Professional fees	0	1,751	1,422	728	572	1,036	728	649	649	728	494	494	731	9,982
Training and development	0	26	21	11	9	16	11	10	10	11	7	7	11	150
Bank charges	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Miscellaneous	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Owner's drawings	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Loan repayments	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Tax payments	0	25,050	0	4,175	0	0	0	0	0	0	0	0	0	29,225
Capital purchases	0	0	0	0	10,000	0	0	10,000	0	0	21,325	0	0	41,325
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Payments</b>	<b>0</b>	<b>62,864</b>	<b>30,716</b>	<b>19,891</b>	<b>22,346</b>	<b>22,366</b>	<b>15,716</b>	<b>24,016</b>	<b>14,016</b>	<b>15,716</b>	<b>32,001</b>	<b>10,676</b>	<b>15,781</b>	<b>286,105</b>
<b>Cashflow Surplus/Deficit (-)</b>	<b>0</b>	<b>(46,164)</b>	<b>(20,696)</b>	<b>(8,785)</b>	<b>(1,053)</b>	<b>(7,670)</b>	<b>650</b>	<b>3,289</b>	<b>8,446</b>	<b>9,251</b>	<b>3,757</b>	<b>19,134</b>	<b>18,451</b>	<b>(21,390)</b>
<b>Opening Cash Balance</b>	<b>0</b>	<b>0</b>	<b>(46,164)</b>	<b>(66,860)</b>	<b>(75,645)</b>	<b>(76,698)</b>	<b>(84,368)</b>	<b>(83,718)</b>	<b>(80,429)</b>	<b>(71,983)</b>	<b>(62,732)</b>	<b>(58,975)</b>	<b>(39,841)</b>	<b>(747,413)</b>
<b>Closing Cash Balance</b>	<b>0</b>	<b>(46,164)</b>	<b>(66,860)</b>	<b>(75,645)</b>	<b>(76,698)</b>	<b>(84,368)</b>	<b>(83,718)</b>	<b>(80,429)</b>	<b>(71,983)</b>	<b>(62,732)</b>	<b>(58,975)</b>	<b>(39,841)</b>	<b>(21,390)</b>	<b>(768,803)</b>

# Goals and Metrics

Identifying Organizational Goals- Your Team's understanding and direction starts with you!

## Key Metrics

PROFITABILITY  
Capital & Revenue  
Sales & Marketing  
Expenses & Cost Per \_  
Quality & Quantity  
Reinvestment Costs  
Cost Red. & Efficiency

How do you define Success? What do you measure? Do you SOPs support your training and growth?

## Company

Annual  
Quarterly  
Monthly  
Weekly  
Daily

Reporting Tools?

Frequency? Ease?

How do you make Course Corrections?

## Departmental

Annual  
Quarterly  
Monthly  
Weekly  
Daily

Reporting?

Incentives?

Consequences?

## Individual

Annual  
Quarterly  
Monthly  
Weekly  
Daily

Reporting?

Incentives?

Consequences?

**Be Clear!**  
**Be Intentional!**  
**Long/ Short Term?**  
**What's in it for me?**  
**What's in it for them?**  
**Use easy metrics!**  
**End Dates on Goals?**



# DEFINE. DELEGATE. DELIVER.

**Define your role and the roles of others. You work on "Owner" duties only.**

You pay people for their time so you can have time to be free and think about growth.

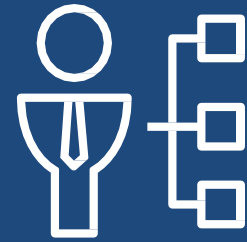
**Delegate tasks after you have created SOPs and training programs.**

Your SOPs and training programs allow others to do the tasks that you should not be doing at the Owner.

**Deliver services and products at the highest level with repeatable processes.**

Your processes and training set guidelines for your team to deliver consistently to customers without you.





# Panel

**Panel: Building a Sustainable Organization's Infrastructure**

**During our 2<sup>nd</sup> hour...**

# Questions & Answers



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