





Reach for the stars!



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# Welcome



*A few months ago, we had a brilliant idea. Wouldn't it be great if someone wrote a business playbook that told us what to do and when to do it?*

Not just a one-and-done book with business concepts, but *an actual playbook with how-to's, tips, tools, and reminders to help us manage all the tasks associated with running a successful business.*

A book with plays that are updated every year to reflect the way we do business now, not five, ten, or twenty years ago.

As much as we loved the idea, we wondered how one book could work for everyone.

Our original concept led to a lot of brainstorming about what a playbook would do and what type of plays it would include.

Every business has unique goals and needs, but certain themes are universal.

Lisa and I thought about how we would use a playbook.

For us, a business playbook would organize monthly and quarterly tasks.

It would remind us to do all those things that micro-business owners and solopreneurs overlook or avoid during the year.

Finally, it would help us keep things fresh by pursuing an annual theme.

We liked the sound of it, so we built it.

The Business Guild's Annual Playbook breaks down the year into actionable quarterly and monthly

steps in five areas of business:

- Goals & Planning
- Sales & Marketing
- Customer Relationships
- Back Office
- Work/Life Balance

Each quarter will focus on a different topic that supports our annual theme, Be Audacious, and will include monthly actions to help you apply some audaciousness in every area of your business.

We plan to use the playbook to guide our annual game plan, and will post content that coordinates and supports the quarterly and monthly themes.

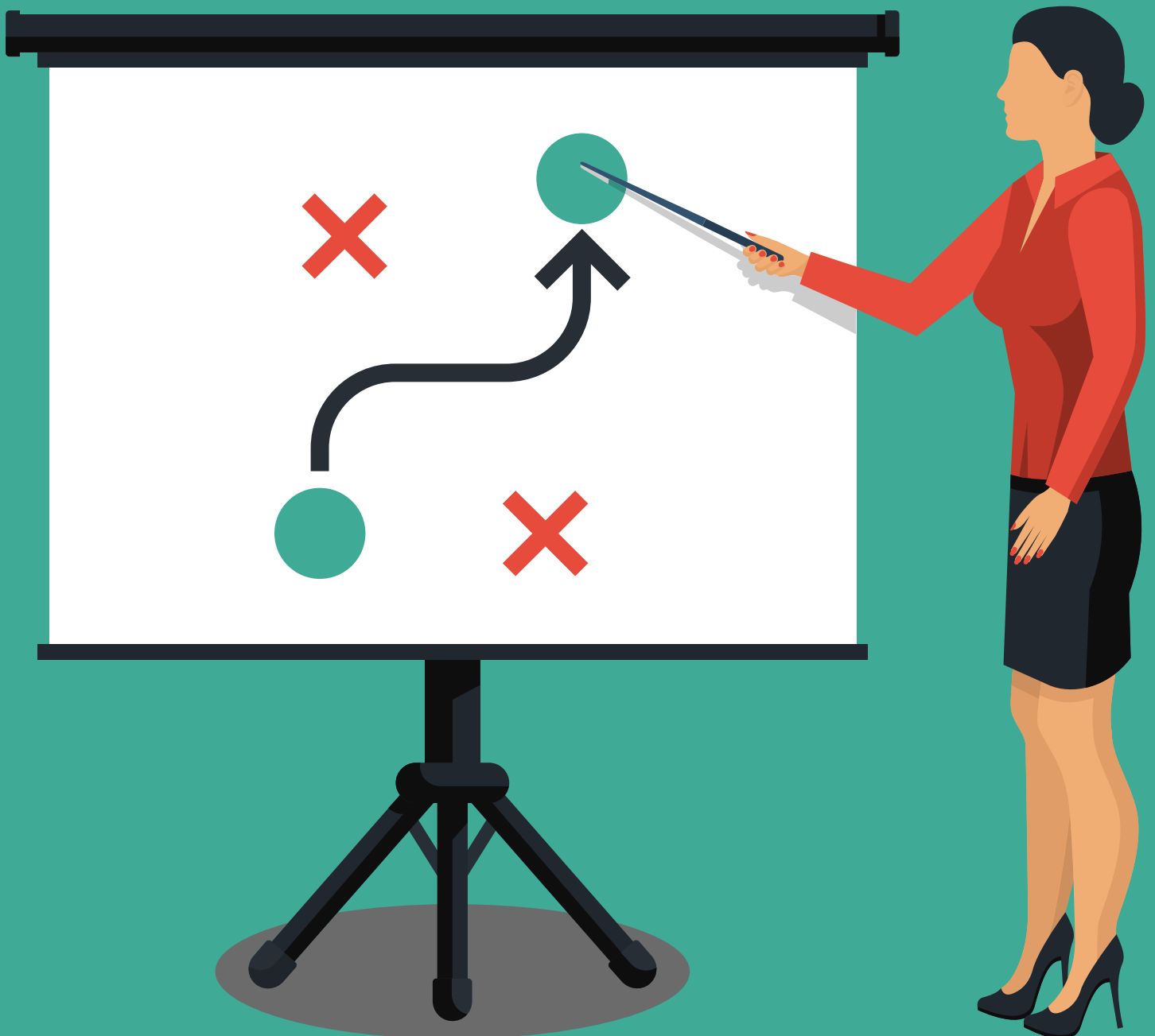
Thank you for choosing The Business Guild's Annual Playbook.

We'd love to hear how you're using it for your business. Find us on LinkedIn or join us in our private forum on [thebizguild.com](http://thebizguild.com).

*Patricia Hammond*

**Co-founder, The Business Guild**

# How to Use the Playbook





The idea for this playbook came from our own needs and we're hoping it can be a helpful resource for you, too!

As micro-business owners, we juggle a lot of tasks. No matter how well organized we are, there is always something that gets forgotten – ***especially tasks that are outside our areas of expertise.***

We built The Business Guild's Annual Playbook around the belief that almost all small businesses have a core group of regular tasks that represent five distinct areas of business:

- Goals & Planning
- Sales & Marketing
- Customer Relationships
- Back Office
- Work/Life Balance

This playbook has quarterly and monthly tasks that support an annual theme.

This year's theme for The Business Guild is 'Be Audacious.' Every task, activity, and challenge is built around the idea of revving up our business by adding a little audaciousness to our regular routines. Feel free to use this theme, or create your own.

We set up the playbook with activities called 'plays' to help us stay on top of common business tasks and create new opportunities.

Every quarter has a short checklist of recurring tasks. Some are maintenance tasks like 'inbox zero', others are regulatory, like tax reporting. The quarterly checklist contains fewer than ten tasks and should be easy for a busy business owner to manage each quarter.

In addition to quarterly tasks, each month has five plays that correspond with each of the five areas of business.

Months also have mini-themes designed to direct that month's activities. For example, July's theme is 'Creating Opportunities' and includes basic tasks to help us create new opportunities.

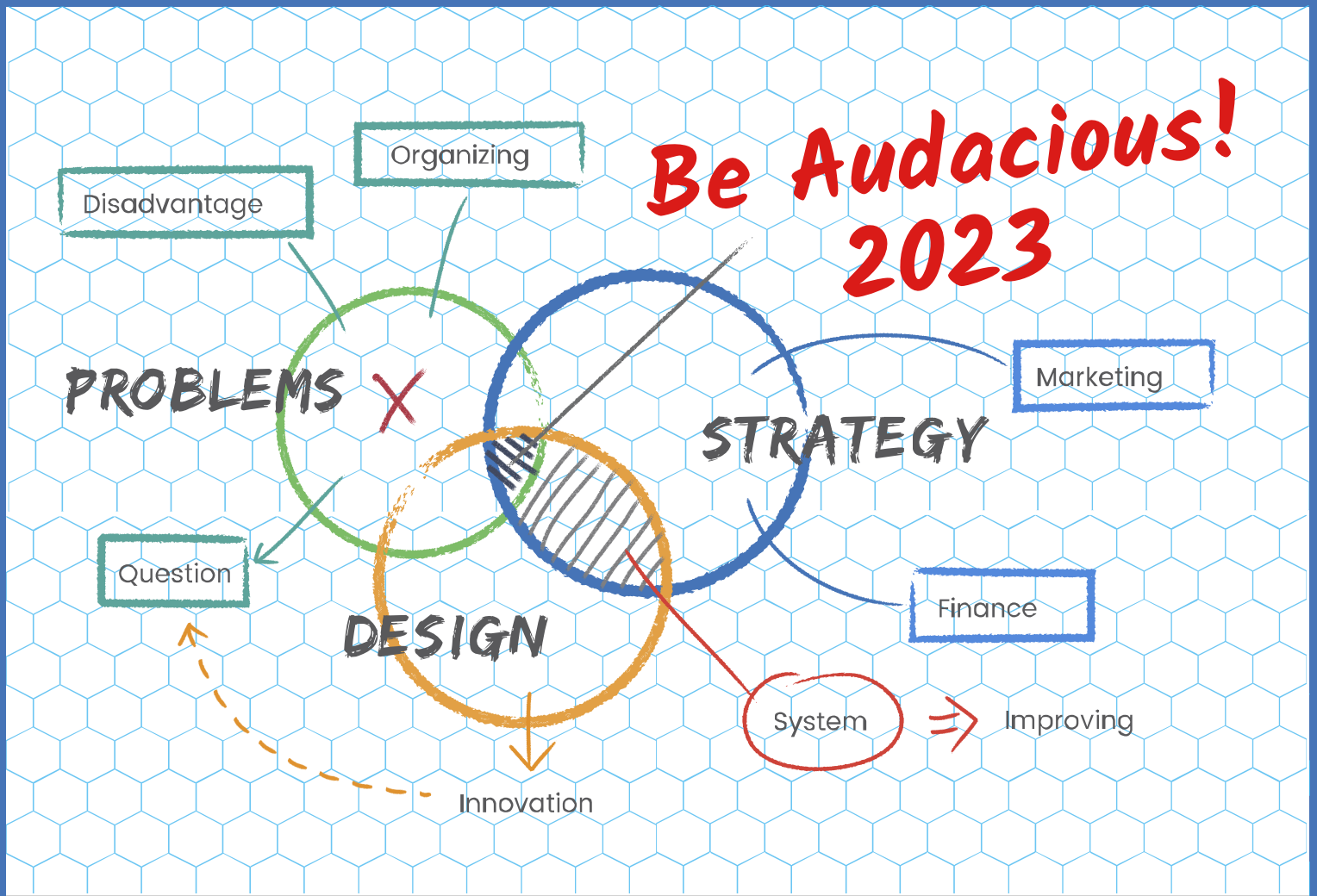
It sounds like a lot when you see it written here, but most activities take less than an hour to complete.

We've laid the groundwork by compiling an entire year's worth of tools, tips, and activities designed to help us – and you – manage all five facets of our businesses.

We invite you to follow along and use the playbook as is, or adapt it to your business!



**Be Audacious!**



*We decided early on that The Business Guild's Annual Playbook would have a theme you can use to find inspiration and focus for both yourself and your business.*

**The theme for 2023 is 'Be Audacious'.**

After almost three years of a pandemic, dealing with an energy crisis, and facing a possible global recession, it feels like it's time for a bold move.

Instead of playing it safe and hoping for

the best, let's step out of our comfort zones.

**Be brave, be daring, be fearless.**

It doesn't mean you should be reckless.

Audacity in business is about changing things up and disrupting the status quo.

Use this year's theme as a catalyst to take on this year's challenges with determination and confidence.

You may just find that your new focus is all it takes to reach your goals and take your business to the next level.

# 5 Things to Do Every Quarter

Each quarter will focus on a different topic that supports this year's theme, Be Audacious.

In addition to refining the theme for a quarterly goal, each quarter also has a recurring checklist with five tasks that you should review or complete every three months.

## 1. Get to Know Your Customers Day

Get to Know Your Customers Day is the third Thursday of every quarter.

- Thursday, January 19, 2023
- Thursday, April 20, 2023
- Thursday, July 20, 2023
- Thursday, October 19, 2023

Nobody knows who started it, but it is a great way to stay connected with customers. It doesn't have to be anything expensive or fancy. Many companies offer giveaways, downloads, or coupons. Some businesses also host in-person or virtual events.

If you struggle to find time to nurture customer relationships, this quarterly activity is also a friendly reminder to

reach out through email or social media and check in with your important clients.

## 2. Blog / Social Media Content

Content is an area that many business owners want to do, but push to the bottom of the to-do list because they don't have time.

We find the best way to overcome this is to sit down once a quarter to schedule your content for the next three months. If you don't have time to create or curate three months' worth of content, make a list of themes and content ideas so you can jump right in when it's time to post.

## 3. IRS / Tax Deadlines

Depending on where your business is located, you may have city, county, state, and federal tax filing requirements. We've put together a list of the most common federal tax deadlines, but you should check with your accountant for a list of local deadlines.

## January

- January 16, 2023 4th Quarter 2022 estimated tax payment due
- January 31, 2023 deadline for employers to send out W-2 forms
- January 31, 2023 deadline to send out 1099 forms (1099-NEC, 1099-MISC)

## March

- March 15, 2023 Business tax returns for partnerships, S corporations, or LLCs that are taxed as partnerships are due. Note: This is for organizations that use a calendar year. If your company's fiscal year does not start on January 1st.

## April

- April 15, 2023 1st quarter estimated tax payment due
- April 18, 2023 Tax deadline for C corporations, sole proprietors (Schedule C), single-member LLCs or LLCs taxed as corporations

## June

- June 15, 2023 2nd quarter estimated tax payment due

## September

- September 15, 2023 3rd quarter estimated tax payment due

Note: Quarterly estimated tax payments include taxes on income and the 15.3% self-employment tax. (see [IRS Publication 505 for more info.](#))

## Inbox Zero

In a perfect world, we'd all clean up our email inbox every week, but that rarely happens. If you struggle to maintain a tidy inbox, take some time once a quarter to file important correspondence and delete all those newsletters and messages you no longer need.

## End-of-Quarter Status Check

It's super easy to get bogged down in day-to-day routines and lose track of the big picture. At the end of the quarter, use the [Status Check Planner](#) to get a quick snapshot of where your projects are and what's left to do.

This is also a great time to review any issues, potential solutions, and new opportunities that have cropped up over the last three months. It should only take about 15 minutes and will provide the clarity you need to finish projects and reach your goals.



*Be the Boss!*



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## **1<sup>st</sup> Quarter: January 1, 2023 - March 31, 2023**

**Audacity is about being bold and doing the things others are afraid to do.**

Our focus this quarter is on breaking out of the status quo by making informed decisions. Instead of starting out with *resolutions* that few people ever keep, this quarter will emphasize holistic, intentional actions that will set you up for success.

In other words, *the first quarter's theme is Be the Boss.*

# 1<sup>st</sup> Quarter Checklist - 2023

This list has five recurring tasks you need to complete each quarter. Some are maintenance tasks like 'inbox zero', others are regulatory, like tax reporting.

We tried to keep it simple enough to fit your busy schedule, just make sure you check off each task as you go along.

- ❑ **Get to Know Your Customers Day 1/19/23**
- ❑ **Blog / Social Media Content**
  - ❑ Planned
  - ❑ Created/Curated
  - ❑ Scheduled
- ❑ **IRS / Tax Deadlines**
  - ❑ **January**
    - ❑ 1/16/23 4th Quarter 2022 estimated tax payment due
    - ❑ 1/31/23 Employers send W-2 forms
    - ❑ 1/31/23 Send 1099 forms (1099-NEC, 1099-MISC)
  - ❑ **March**
    - ❑ 3/15/23 Business tax returns due for partnerships, S corporations, or LLCs that are taxed as partnerships.  
NOTE: If your fiscal year does not start on January 1st, see the **IRS fiscal year guidelines** for your tax reporting deadline.

Don't forget to check with your state department of revenue for individual state tax reporting requirements.

- ❑ **Inbox Zero**
- ❑ **End-of-Quarter Status Check (download Status Check Planner)**

# January is the *perfect* time to reset & refresh...

Set yourself up to achieve the perfect work/life balance by taking control of your day.

Need a little help figuring out what your perfect balance looks like?

See our article *Create YOUR Perfect Work/Life Balance & Have the Best Year Ever!*

Don't forget to download a work/life balance worksheet.



## Join Us for the Success Funnel Podcast!



The Success Funnel Podcast is your one-stop source for everything you need to succeed.

- Planning
- Leadership
- People & Resources
- Opportunity
- Success

Click the link below to hear the latest episodes or join us as a guest!

[successfunnelpodcast.com](https://successfunnelpodcast.com)



# JANUARY 2023

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

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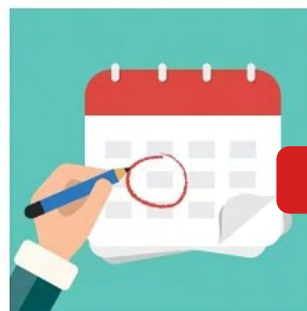
## Did you know January 8 - 14 is National Home Office Safety & Security Week?

Take a few minutes to do a mini-audit of your home office.

- Are your computer patches & security updates current?
- Do you have a cybersecurity plan? How will you respond in the event of a data breach or critical hardware failure?
- Are your files backed up to a secure location?
- What is your plan for an extended power or internet outage?
- Are essential paper documents in a fireproof box?
- Is it time to shred old documents?
- Are walkways to your office clear with easy access to exits?
- Are your cords organized? (This includes cables & extension cords)
- Do you have a smoke detector and two points of egress?
- Make sure outlets aren't overloaded
- Consider asking your electrician to install an outlet on a separate circuit for your electronics
- If you meet clients at home, is your driveway/walkway safe? No broken sidewalks, free of ice/snow?

Don't forget to talk to your insurance agent to make sure your business is covered for damage, loss of income, liability, and anything else that makes sense for your business.

## Jumpstart your 2023 marketing with a content & social media plan!



Episode 2

### Tame Your Content Chaos with a Content Calendar

© The Business Guild, LLC

Check out Lisa's tips for getting ahead of your content.

## Use the customer relationship planner to create a customer relationship strategy for this quarter.

Title: _____		Prepared for: _____
Subtitle: _____		Prepared by: _____
Date: _____		Vers: _____
Start/End Dates	What is the goal for this strategy?	
Who are you trying to reach?	List the steps to implement this strategy	
What channels will you use to reach your customers?	What tools, people, or services will you need? (EPS, CRM, Zapier, content writer, videographer, etc.)	How much will it cost and what is the expected revenue or benefit? Example: A strategy to improve user satisfaction by providing tips & videos for how to use a product might be represented as a 3% increase in additional purchases or referrals with a dollar value of \$10,000

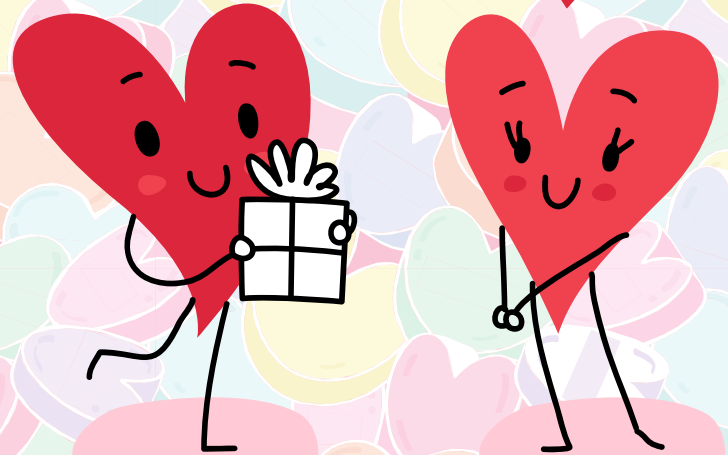
Customer Relationship Planner © The Business Guild 2023

*Download the Customer Relationship Planner*

Need help? Take a look at our article ***How to Create the Perfect Customer Relationship Strategy in 7 Easy Steps.***

# Show some love!

Send your clients a freebie, coupon, or special offer!



## Promote your business by hosting an event!



Hosting a virtual or in-person event is a great way to build relationships, connect with clients, and

promote your business, products, and services.

Common event types include: networking, product launch, celebrating a milestone, and product training.

## Take a snow day!

It's easy to become a hermit when the days are cloudy and the nights are long.

Schedule a day off, whether it snows or not, and get out of the office. If you work from home, plan an activity that will get you out of the house.

(Moving your laptop to the livingroom and working in front of the TV does not count as a day off!)







# When was the last time you reviewed your company's core customer service policies?

Starting a business is overwhelming. There are so many things we want to do and even more that we have to do before we take on our first client.

In the rush to get through that first to-do list, it's easy to neglect some of the less sexy tasks, like developing legal, enforceable terms of service, cancellation, and refund policies. Most times, we just download a boilerplate guideline we like from the internet and forget about it.

It's better than nothing, but not much.

Setting aside the fact that every state has its own laws, it's important to commit to policies that reflect the needs of your business, not a company that provides a completely different service on the other side of the country.

If you haven't looked at your policies since you posted them on

your website, take advantage of the winter slow time to review and update your terms of service, cancellation, and refund policies.

Don't be afraid to ask your lawyer for help. The cost for this service is usually minimal and will pay for itself the first time you have to invoke it for an unhappy client.



# March Is Marketing Month!

Spring is here and it's time to get serious about promoting your business.

Review your marketing plan. If you don't have a marketing plan, **download our easy one-page marketing planner** and spend a few minutes building an overall strategy or brainstorming your next campaign.

Looking for help? Check out our article "**Marketing Canvas: 5 Steps to Your Perfect Marketing Strategy.**"

Title: _____		Prepared for: _____	
Subtitle: _____		Prepared by: _____	
Date: _____		Vers: _____	
<b>Customers</b>		<b>Competitors</b>	
Who are you trying to reach?		How is your product better?	
Who are your competitors?		Who are your competitors?	
What problem do you solve?	What do your customers value?	What are their strengths?	What are their weaknesses?
Channels	Metrics	Cost	Funding
➔		➔ ROI	
Marketing Canvas		ENR Business Guide 2020	



## March 14th Is National Organize Your Home Office Day

Set aside 30 minutes to neat and tidy your workspace.

Don't forget to clean the space heater tucked under your desk.

If you have some extra time, tackle your downloads folder -- file all those stray downloads and delete anything you no longer need.

## Take the 6-Week Challenge

Celebrate spring by rediscovering an old hobby.

- Gardening
- Photography
- Piano

Take advantage of the warmer days to step away from your desk and have some fun!

**March 1<sup>st</sup> - April 12<sup>th</sup>**





## Contracts: Review marketing service providers you currently use. (CRM, email, etc.)

Don't let your service contracts auto-renew!

- Do they still work for you?
- When do the contracts renew?
- Should you look for a new marketing service?
- Have the prices gone up?
- Can you use one provider for multiple services?

Do you really read all those email updates from the companies you subscribe to?

It's common for platforms and services to increase prices, add new products, and alter the terms of service.

Block off half an hour to review current providers and see if they are still the best fit for your needs and budget.



## Time to start thinking about next month's customer relationship strategy

Step away from the tired old email campaign and brainstorm a new strategy to stay in touch with customers.

- Share case studies highlighting how others have used your products/services
- Host a virtual open house where people can stop by and get quick tips for how to use your products
- Create a customer board for your top customers to provide input and insights on how to add value to your offering

**Tip: Skip the sales pitch and focus on building stronger relationships.**

# Top Tip: Don't waste time and money reinventing the wheel

Instead of using valuable resources on creating a completely new product or service, bundle a group of services or find a way to repackage an existing product for a new market.

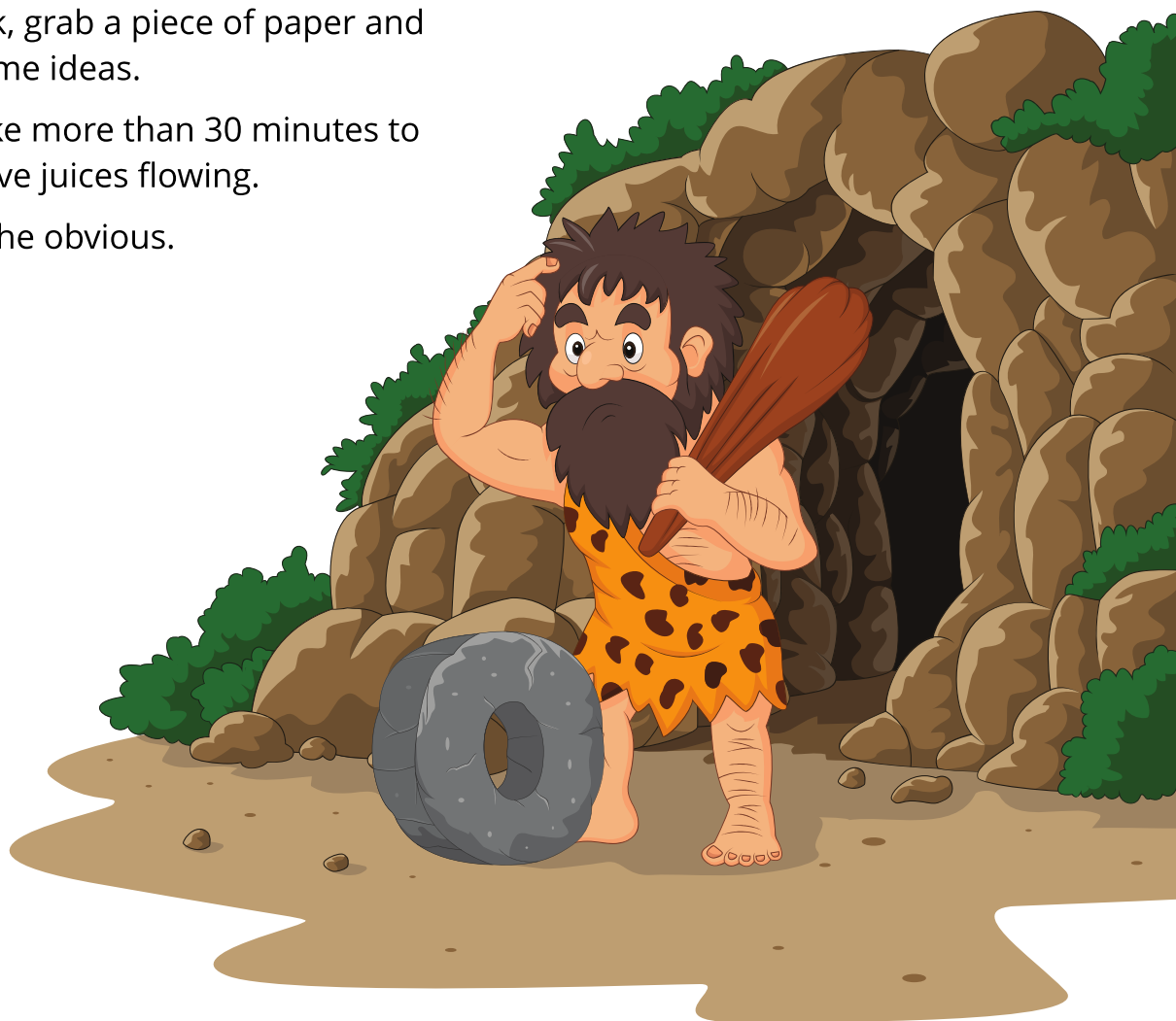
Here are some examples to get you started:

- Combine a webinar + an ebook for a package deal
- Bundle a series of webinars to create a masterclass
- Offer a 1-on-1 session with an online class for personal attention
- Repackage general business products/services to appeal to a different (related) market. Example: If your target market is daycare centers, think about other businesses with similar needs like adult daycare. It doesn't have to be too literal. Most business services work for other businesses.

If you get stuck, grab a piece of paper and brainstorm some ideas.

It shouldn't take more than 30 minutes to get your creative juices flowing.

Hint: Go with the obvious.





*Energize & Get Moving!*

## **2<sup>nd</sup> Quarter: April 1, 2023 - June 30, 2023**

Springtime is about growth and new beginnings. Bring some audaciousness to your business by getting in front of your customers with activities your competitors are either too lazy or too scared to do.

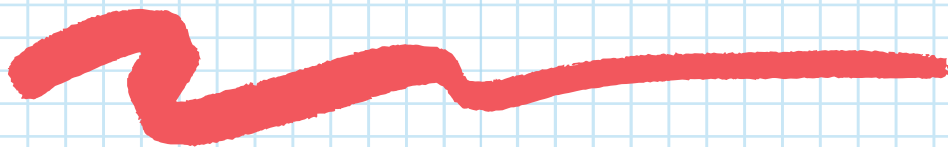
To put it another way, *this quarter's theme is Energize & Get Moving.*

# 2<sup>nd</sup> Quarter Checklist - 2023

This list has five recurring tasks you need to complete each quarter. Some are maintenance tasks like 'inbox zero', others are regulatory, like tax reporting.

We tried to keep it simple enough to fit your busy schedule, just make sure you check off each task as you go along.

- ❑ **Get to Know Your Customers Day 4/20/23**
- ❑ **Blog / Social Media Content**
  - ❑ Planned
  - ❑ Created/Curated
  - ❑ Scheduled
- ❑ **IRS / Tax Deadlines**
  - ❑ **April**
    - ❑ 4/15/23 1st quarter estimated tax payment due
    - ❑ 4/18/23 Tax deadline for C corporations, sole proprietors (Schedule C), single-member LLCs, or LLCs taxed as corporations
  - ❑ **June**
    - ❑ 6/15/23 2nd quarter estimated tax payment due
- ❑ **Inbox Zero**
- ❑ **End-of-Quarter Status Check (download Status Check Planner)**



# Earth Day is a great time to be a good steward of your planet & community!

Many people want to do business with companies that are conscious of their impact on the planet and local community. What can you do to be a beneficial business owner who supports the environment and social issues?

Not sure what a beneficial business is? **Check out B Lab's website** for an overview of how your business can be a force for good (as well as profit).



# APRIL 2023

SUN	MON	TUE	WED	THU	FRI	SAT
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

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# Did you know April is records and information management month?

Do you have a data rescue plan? What would you do if your business was the victim of ransomware or a data breach? What if your website was hijacked?



Think it won't happen to you?

What about something a little more familiar like a bad update or failed hard drive?

Block off an afternoon to review how your business uses technology and develop a rescue plan for when something goes wrong.

## Get Your Geek On!

### DIY Your Website Like a Pro! (No Coding Skills Required)

Learn how to build a modern, professional, budget-friendly website with absolutely no coding skills!

**Seating is limited - Register Today!**

**\$75/Members • \$150/Non-Members**

To provide an optimal learning experience, we are limiting attendance to ten people at each session

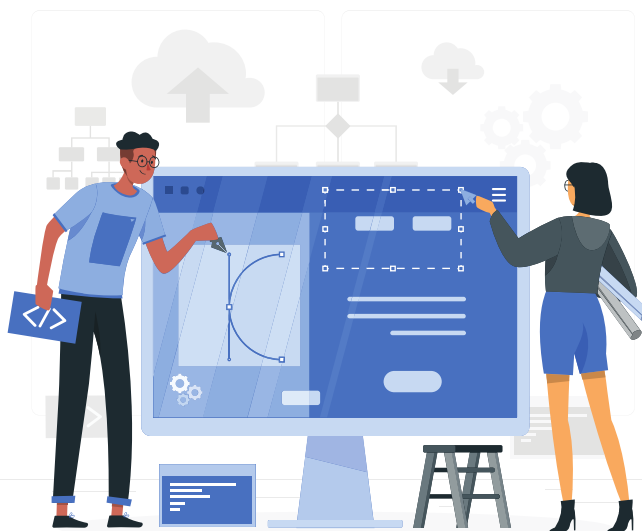
See [thebizguild.com](http://thebizguild.com) for details

## Live Workshop

2 Dates to choose from:

Wednesday, April 12th 5:30 PM - 8:30 PM ET

Saturday, April 15th 10:00 AM - 1:00 PM ET







## How can you make a difference?

Being a visible, active participant is a great way to connect with customers and other local business leaders.

Think about joining or sponsoring a local charity, group, or event.

## It's a lot easier to find balance when you enjoy what you do

Take half an hour to think about a new business, product, or service that incorporates something you enjoy,

something you're good at, and something that will make money.



# Time to clean up your mailing lists

Set aside 30 minutes to update your contacts and mailing lists.

Review who never opens your emails and update or remove any out-of-date contact information.

If you have time, create a special campaign to find how people want to stay in contact.

Some people don't want a regular newsletter or sales campaign, but do want to see product information and updates.

Be sure to reach out directly to important clients.



# May Is Small Business Month

Celebrate your small business.

Host an event, send out a special offer, and give a shout-out to your small business customers on social media.



## Extend your marketing reach & budget with a cross-promotional campaign



Partner with another small business (or two or three small businesses!) for a cross-promotional event or campaign.

# Websites 101: Everything You Need to Know to Get Started



New Webinar

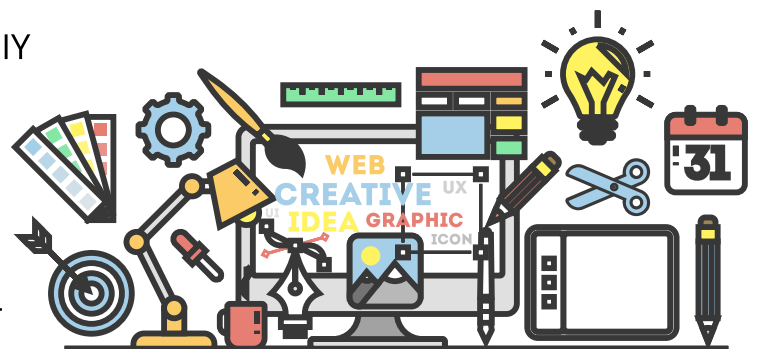
*Are you overwhelmed by the idea of setting up or updating your small business website?*

This 1-hour workshop will walk you through everything you need to know to get your new website up and running.

- How to choose a platform and host
- Decide if it's better to hire a pro or DIY
- Buying a domain name
- Basic maintenance & backups

Join us on Wednesday, May 17th from 12:30 PM - 1:30 PM Eastern

See The Businesss Guild's **events page** for details





# Create a website maintenance schedule

**Between bad updates, bots, scripts, and hackers, your website faces a constant onslaught that can bring your site down and destroy your reputation.**

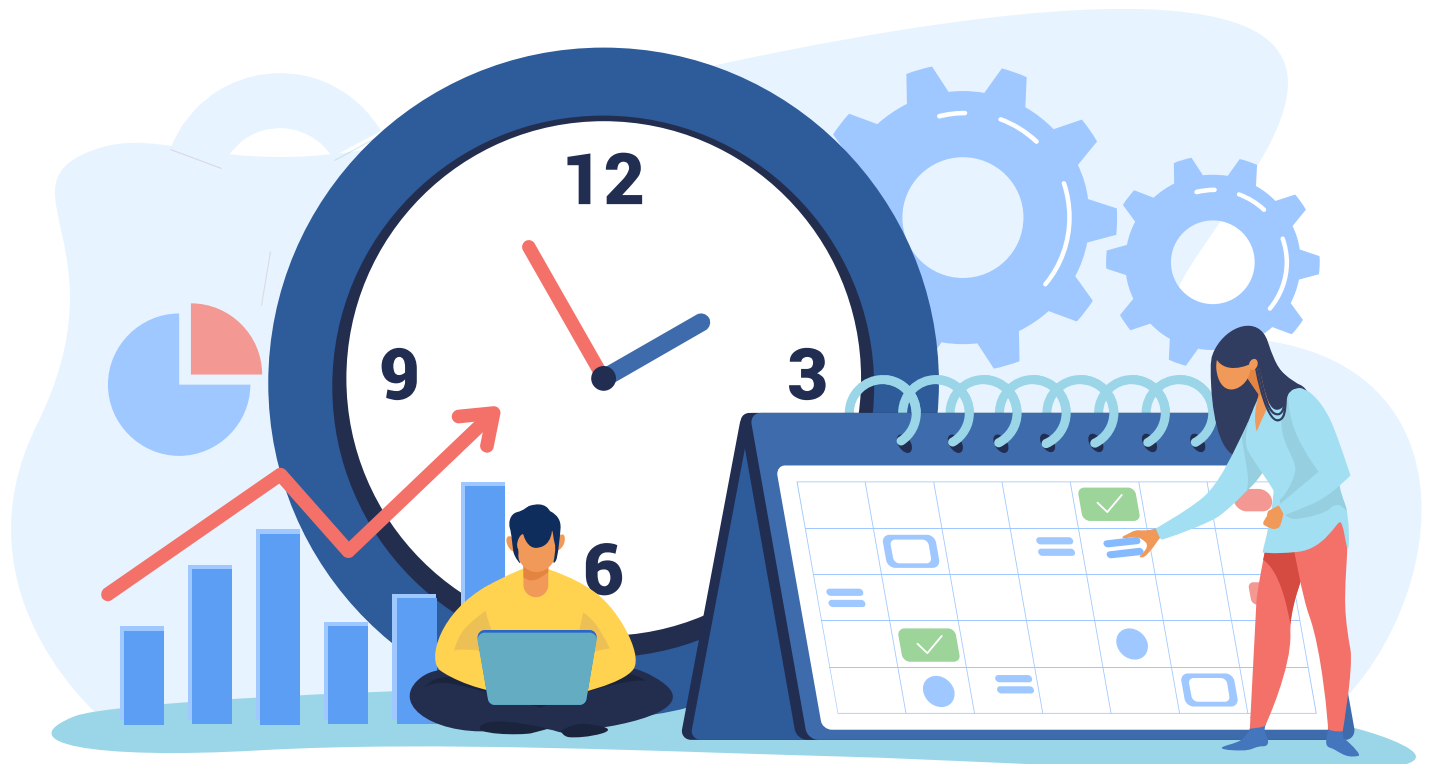
The good news is that it only takes a few minutes of work to ensure your site is up and running smoothly.

Set aside 15 - 30 minutes to create a website maintenance schedule to run back-ups and check for patches and updates.

Don't forget to include:

- Daily integrity checks (This means visit your website once a day to make sure it's in working order.)
- Weekly patches
- Daily or weekly backups depending on how often you add content

Be sure to maintain several historical backups in case the latest one is corrupted.



## It's a little known fact that May is also revise your work schedule month

As the days get warmer, it makes sense we want to spend more time outside the office. Schedule an hour to review and update your work schedule for summer.

You may not be able to get out of work, but you can set things up so you can take a long lunch, leave early, or step away from the office once or twice a week.

Need a little direction? Check out *Create Your Perfect Work/Life Balance & Have the best Year Ever* and *Boost Your Productivity with Our Fantastic Time Tracker Tool*.

# Start getting ready for summer!

## Dream Big & Be Bold

Part of the joy of owning your own business is the endless possibilities.

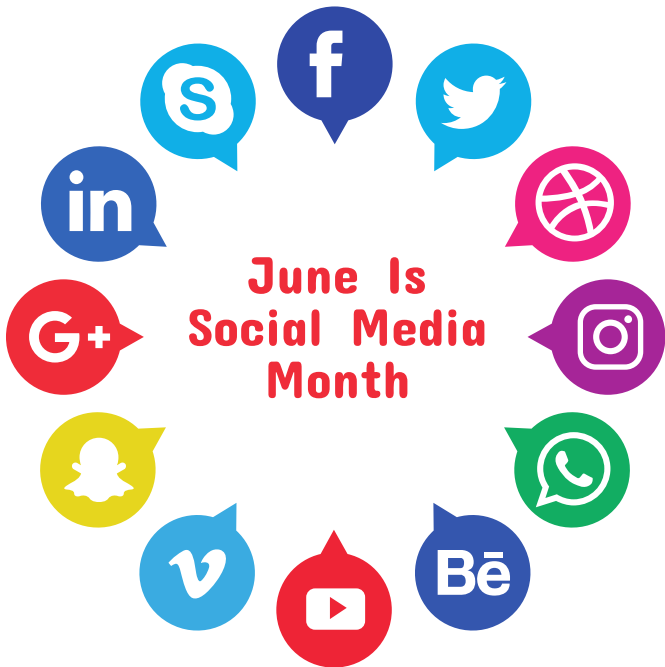
You control the narrative and can jump right in when you see an opportunity.

So dream big and be bold.

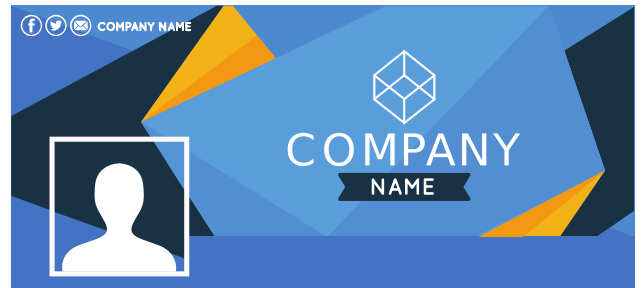
Step outside your comfort zone and brainstorm a new product or service.

Once you've fleshed out the idea, download The Business Guild's **Products & Services Development Planner** and develop a plan to make it happen.





June Is  
Social Media  
Month



## When is the last time you updated your company's social media page(s)?

You put so much work into getting the right words and creating the perfect image when you put up your first social media profile. It's easy to forget you have to update those social media pages to keep them fresh.

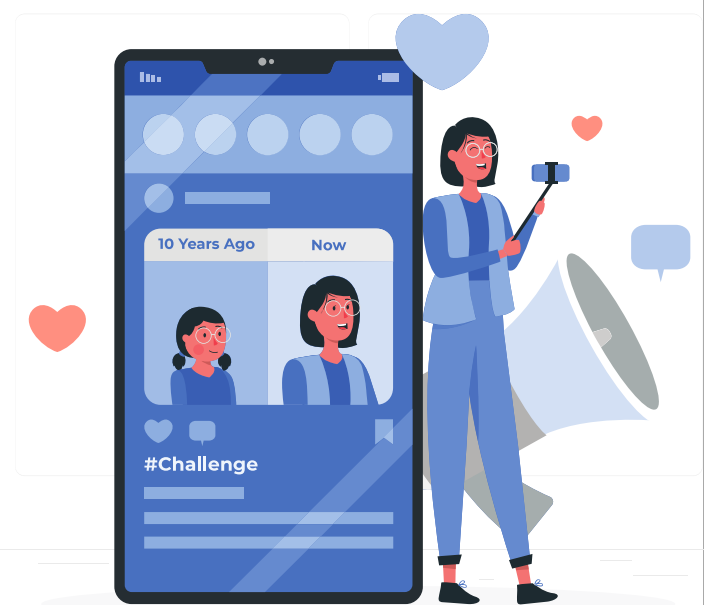
Now that you've updated your brand, take a few minutes to update images, taglines, messages, and links on your social media pages.



## Your brand is more than a tagline or logo

Block off an afternoon to review the four components of a brand - the promise, expectation, application, and keywords.

Looking for help with your brand? Read *How to Build a Killer Brand in 4 Steps* and use the **Brand Planner Canvas** to develop your brand strategy for every part of your organization.





# Nobody wants to think about it, but...

## What would you do if your most valuable employee got sick, injured, or quit?

What if you got hurt and couldn't work for a while?

Read *How to Keep Your Business Running Through Injury or Illness* then talk to your insurance agent about your options.

You'll sleep a lot easier the next time you land a big project and you'll be pleased how affordable key employee coverage is.



# Mark your calendar, June 2nd is National Leave the Office Early Day



Clear your calendar and plan to leave by 3:00 PM (or earlier!).

If that's not possible, June 16th is National Take Back the Lunch Break Day. Celebrate by stepping away from your computer to enjoy a work-free lunch break.

Even better, connect with a friend and take a long lunch!



## Mastermind



### Accountability for Business Owners

## Join Lisa for Accountability for Business Owners!

Moderated mastermind group with peer-to-peer discussion.

- Goal setting & action planning
- Brainstorming & troubleshooting
- Accountability for what you do & don't do

**SEE IT - OWN IT - SOLVE IT - DO IT**

11:00 AM - 12:15 PM Eastern, every other Friday

**Visit the group's webpage on [thebizguild.com](http://thebizguild.com) for more info**



## Stay in touch

Social media is one of the easiest ways to stay in touch and build strong connections with customers.

Make sure to follow customers on your favorite social media platforms.

Be quick to share content, give an att'a' boy/girl, and invite them to follow and share your page.

**Remember: Meaningful engagement is more valuable than likes.**



## **3<sup>rd</sup> Quarter: July 1, 2023 - September 30, 2023**

Most people think they will find success by following a formula or doing the exact same thing someone else has done. Audacious entrepreneurs know that is a fast track to stagnation.

*Success requires an evolution in our ideas and practices.*

This quarter's focus is on *keeping the wheel turning*.

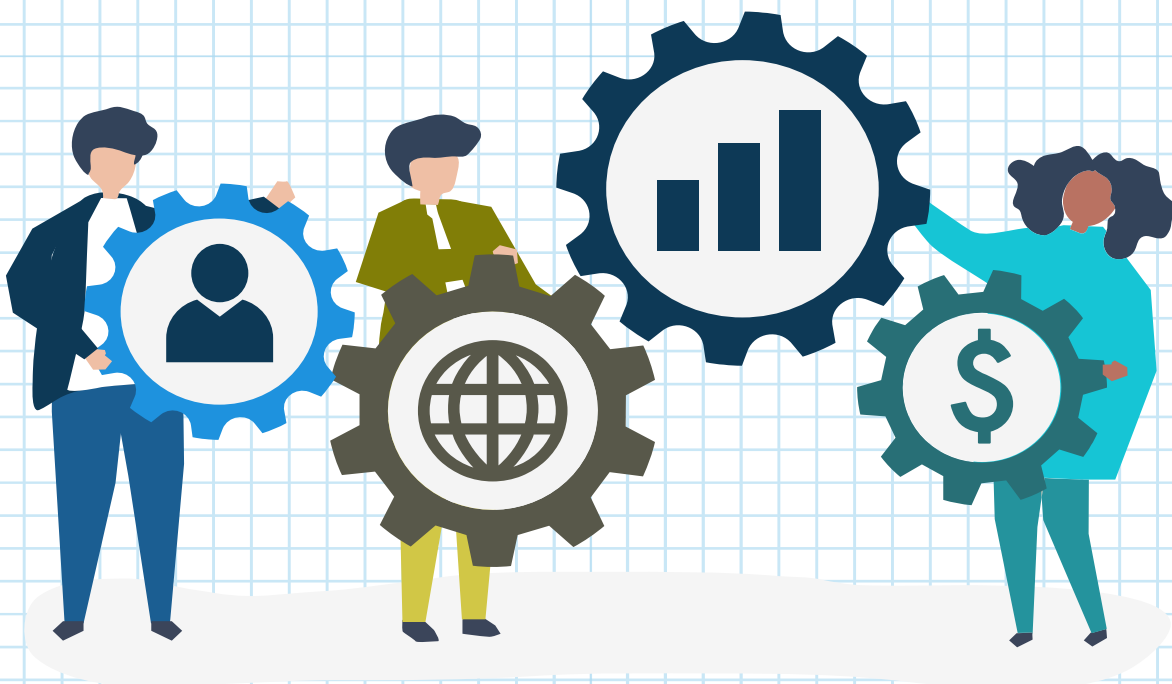
We want to build on what we've already done, let go of what didn't work, and take a chance on new ideas so we can create new opportunities and take our businesses to the next level.

# 3<sup>rd</sup> Quarter Checklist - 2023

This list has five recurring tasks you need to complete each quarter. Some are maintenance tasks like 'inbox zero', others are regulatory, like tax reporting.

We tried to keep it simple enough to fit your busy schedule, just make sure you check off each task as you go along.

- Get to Know Your Customers Day 7/20/23
- Blog / Social Media Content
  - Planned
  - Created/Curated
  - Scheduled
- IRS / Tax Deadlines
  - September
    - 9/15/23 3rd quarter estimated tax payment due
- Inbox Zero
- End-of-Quarter Status Check (download Status Check Planner)





**July is all about  
creating  
opportunities!**

## **Opportunities don't happen on their own!**

Review *5 Things You Can Do Today that Will Create Opportunities Tomorrow* and get to work on learning a new skill, putting together an advisory board, making a savings plan, and creating a go-to presentation. -- We're assuming you already have a business plan, but if you don't, **download our Business Canvas Planner** and pencil in an hour to fill it out.





# Create a marketing campaign for existing customers

Focus the campaign on *connecting* instead of *selling* a new product or service.

Find out how they're doing, offer tips and case studies for how other people use your products, and be sure to follow up with a personal email or phone call.

Be sure to use email personalizations if your customer segment is too large for you to call everyone.

Example: Use the customer's name, refer to a specific service they signed up for, etc.

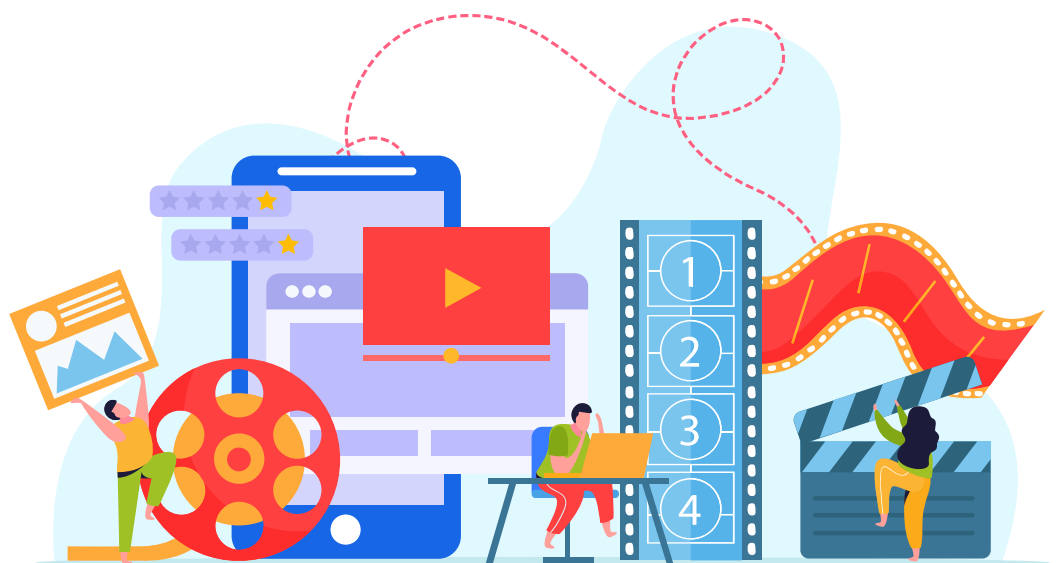
Save time by using our **Email Marketing Planner** to plan and organize your campaign.



# Shoot a series of three 1- or 2-minute videos for your website or social media

Camera shy? It's okay.

You can use slides or graphics if you're not comfortable in front of a camera. Or compromise and do a voice-over that shows your personality.





Get your **FREE** subscription to Flackery magazine!

Flackery is The Business Guild's quarterly digital magazine featuring articles of interest to solopreneurs and small business owners.

**Get your subscription today!**

## Are you having a hard time competing for talent?

Check out this article from Flackery magazine, *Attracting New Employees: Making a Positive Impression at Every*

*Step of the Hiring*

*Journey* for actionable tips to help you stand out and successfully compete with bigger companies.



## Take a break - you earned it!

We all know that running a business can be stressful and time consuming. The thing we forget is that when you're the owner, you don't punch a time clock.

It may be a perk you don't use very often, but take time for a well-deserved break.

Invite a friend or colleague for coffee.

Catch up and enjoy 30 blissful, work-free minutes.



# MAKE *it* Happen

While everyone else is complaining about the heat, start laying the foundation for September.

Plan your fall social media calendar, sign up for a new networking group, or create a new marketing campaign.

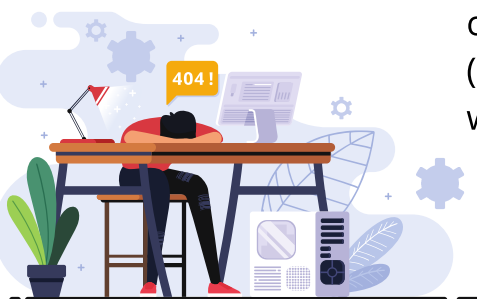


## Did you break your website?

You thought you'd save a little money and built your own website. It was perfect right up until you made that last edit, now you're banging your head on your desk trying to figure out what went wrong.

Don't worry, we've got you covered. ***Check out [How to Fix Your Website When DIY Goes Wrong](#)*** for the solution to three

common (frustrating!) website issues.



## Identify a new niche (or two!)

Niche marketing is a great equalizer for organizations that don't have deep pockets or a dedicated marketing staff.

You could even say it's the secret weapon in a micro-business owner's arsenal.

***Read [3 Proven Strategies to Succeed in a Niche Market](#)*** and brainstorm how you can find a new niche for your business.

Remember: You can reuse or repackage existing products and services for your new market segment.







# Too many tasks making you feel overwhelmed?

Review your to-do list and identify the things you must do, the things you want to do, and the things you're never going to do.

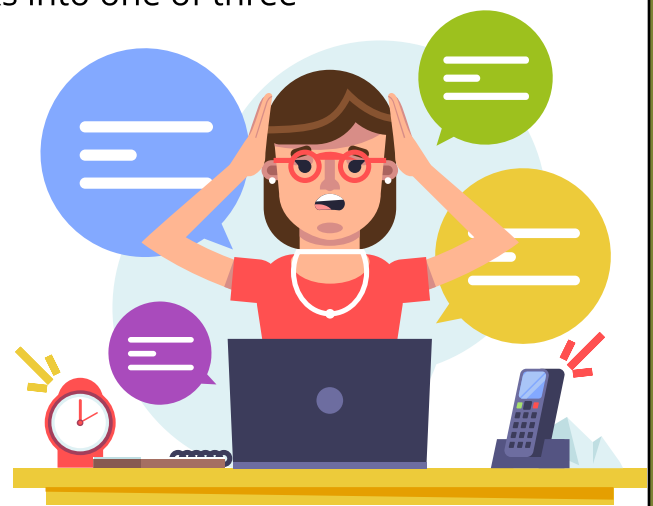
Delete everything on the 'never going to do' list.

Now that the list is smaller, sort the remaining tasks into one of three categories:

1. Things you can automate
2. Things you can outsource
3. Things you have to do yourself

You'll be surprised by how much breathing room you have when you're not trying to do everything yourself.

Need a little more help? *Read 2 Simple Steps to Control the Chaos.*



# Take a class & learn a new skill!



Reaching personal and business goals requires the ability to learn and grow.

Expand your skills with a class, workshop, or webinar.

Check out **Coursera**, **Creative Live**, and **The Business Guild** for our latest classes and workshops.

# Start a customer advisory board

**Instead of bombarding all your customers with polls or emails, select 3-5 customers to act as an advisory board.**

This is a win/win for you.

Customers always have great ideas for new products and services and they appreciate that you take the time to listen.

Meet with each board member 1-on-1 and as a group.

Listen to their challenges, offer suggestions or referrals, and let them beta test your new products and services.

Remember, you can always replace or add new customers to the board.



# Fall is your opportunity to pick up a new hobby

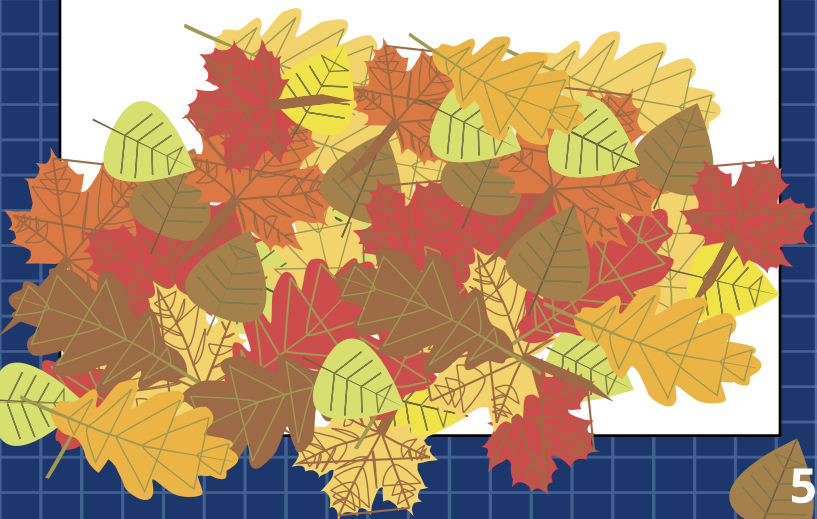
Hobbies are a great way to have a little fun, broaden our interests and meet new people. (Networking doesn't always mean business.)

Take the 6-Week Back-to-School Challenge and:

- learn a new language
- take a dance lesson
- join a bowling league

Step out, get social, have some fun!

Sept. 1<sup>st</sup> - Oct. 13<sup>th</sup>



# September status check

Sometimes, no matter how hard we try, things don't go the way we planned.

It's okay.

September is your opportunity to review, reboot, and finish the year strong.

Block off an hour to sit down with our **Status Check Worksheet** to figure out what's been done, what's left to do, and what needs updating to reach this year's goals.

## Download the Status Check Worksheet

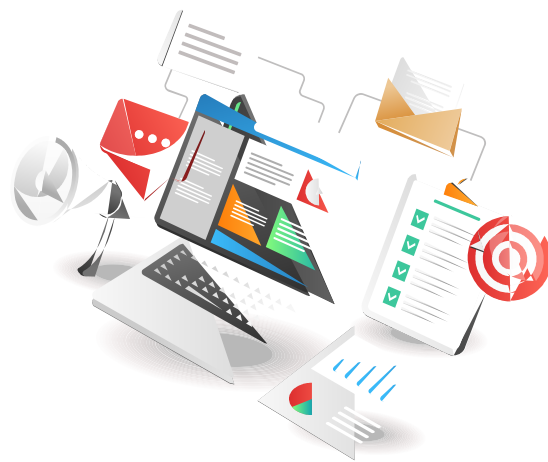
The worksheet is titled "Status Check Worksheet" and includes the following sections:

- Title:** \_\_\_\_\_
- Subtitle:** \_\_\_\_\_
- Prepared for:** \_\_\_\_\_
- Prepared by:** \_\_\_\_\_
- Date:** \_\_\_\_\_
- Vers:** \_\_\_\_\_
- What's Been Done:** List completed tasks
- Current Status:** Provide summary of current situation
- What's Left To Do:** List next steps
- Issues:** List known or potential problems
- Opportunities:** List new or potential opportunities
- Solutions:** List solutions for anticipated problems/opportunities

Arrows indicate a flow from Issues to Opportunities to Solutions. The bottom of the worksheet is decorated with autumn leaves.



*It's September and that means it's time to take stock of your goals & make adjustments to finish 2023 strong!*



**When was the last time you updated your website or marketing material?**

You don't have to reinvent the wheel, but it's always a good idea to review and refresh things like web pages, handouts, flyers, brochures, and digital downloads.

## Reconnect with your clients

People are ready to meet after the long summer break.

Schedule an in-person or virtual event to thank your customers for their support.

Be sure to put together an awesome goody bag with coupons, handouts, and downloads.



# Save yourself a headache at tax time

Take a few minutes to make sure your accounting is up to date and file all your receipts in an easy to remember location.

Tip: Take a picture of cash register receipts so they won't get lost or fade before you hand them over to your accountant.





## *Pedal to the metal!*

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### **4<sup>th</sup> Quarter: October 1, 2023 - December 31, 2023**

The clock may be ticking, but there is still plenty of game left to play.

Now is the time to take advantage of all the hard work you've done all year.

Be bold and confident in your decisions. Leverage your new and stronger customer relationships to reach new clients and create new products and services.

Now that you've automated, outsourced, and organized everything, it's time to go full tilt and finish the year strong!



# 4<sup>th</sup> Quarter Checklist - 2023

This list has five recurring tasks you need to complete each quarter. Some are maintenance tasks like 'inbox zero', others are regulatory, like tax reporting.

We tried to keep it simple enough to fit your busy schedule, just make sure you check off each task as you go along.

- Get to Know Your Customers Day 10/19/23
- Blog / Social Media Content
  - Planned
  - Created/Curated
  - Scheduled
- Inbox Zero
- End-of-Quarter Status Check (download Status Check Planner)

Look how short this to-do list has gotten now that we're at the end of the year!



This is it. It's officially the last quarter of 2023. Time to turn up the heat & spice things up!



**You can't make informed decisions without all the data.**

Take a look at *5 Essential Accounting Reports and Why You Need Them*, and think about which reports can help you improve your bottom line.

## Does your sales strategy use all 5 components of a winning sales plan?

Use our Sales Planner tool to map out your sales strategy.

1. Prospecting
2. Preparation
3. Presentation
4. Closing
5. Follow Up

Need a little guidance? Check out our article *Learn to Love Sales with Our Super Simple 5-Step Sales Planner*.

A 5-step sales planner form titled "Sales Planner Canvas". It is divided into five main sections: Prospecting, Preparation, Presentation, Closing, and Follow Up. Each section contains specific tasks or questions. A red arrow points from the text above to the form. The form includes fields for "Campaign Title", "Subtitle", "Prepared for:", "Prepared by:", "Date:", and "Vers:". A dashed arrow points from the "Follow Up" section to the "Ask for referrals" task.

Campaign Title		Preparation		Presentation	
Subtitle		How do you solve their problem?		Demonstrate Value	
<b>Prospecting</b> Identify the customer	Identify customer's pain point	How is your solution different/better?		Overcome Objections	
Connect with the customer		<b>Follow Up</b> Build long-term relationship		Ask for referrals	
<b>Closing</b> Ask for the sale					

# OCTOBER 2023

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

TO DO	

NOTES

# Are you ready for 2024? (No, we're not kidding.)

Today's actions lay the foundation for next year's success.

Use the **Business Planner** or **Goal Planner** to start developing your strategy for next year.

Ready to think long-term?

Check out the **5-Year Strategic Planner** too!



## As the days get shorter, it's important to rethink your work routine.



It's easy to fall into bad habits and forget about self-care when you start and end your day in darkness.

Take a few minutes to update your work schedule for fall and winter with our **Work/Life Balance Worksheet**.

# Boost your customer relationships in 3 easy steps!

Our three favorite tips for boosting customer relationships are:

1. automate communication
2. establish a personal connection
3. follow through

Think about how you can implement these methods into your own customer

relationship strategy.

All three are doable, no matter how many customers you have, and they will help you stand apart from your competitors.







Thank your customers with a little something special.

Don't overthink it!

Put together a simple download or freebie that will make their job easier.



## We're going to let you in on a little secret.

*A lot of people start more than one business.*

Sometimes it's a side gig, other times it's a full second (or third!) business.

In honor of National Entrepreneur's Day, set aside an hour to review all those great ideas you jotted down during the year.

Use the **Product & Services Development Planner** and the **Business Planner** tools to test your ideas and see if they will work in the real world.







## Prepare for the year-end festivities with a little video magic

*Bring a little fun and playfulness to the hectic holiday season with a series of three 1- or 2-minute videos.*

Keep them upbeat, no overt selling.

Just a little something that shows your brand's personality and makes it memorable.

Do it now so you can launch it in December. (No pressure...)

**It's December, time for the big finish!**



## Marketing year in review

Set aside a couple of hours to review this year's marketing efforts.

What worked, what didn't, and what needs to be changed?

Analyze your data to determine if you're in the right market with the right message.

And adjust your strategy for next year.



Some people expect a "Merry Christmas," some are offended, and others simply appreciate the sentiment whether they celebrate one of the traditional December holidays or not.

Unless you own a faith-based business, it may be a good idea to stick with universal themes of giving thanks, joy, family, and celebration when extending greetings to customers.

It's also a good idea to have a prepared response for your employees when someone complains about the message.





**If you can swing it, December is a great time to take a few days off to rest and reflect on a busy year.**

**Kick back, relax, and enjoy.**

You've put in a lot of extra (unpaid) hours this year and you deserve to celebrate your victories, catch up with friends, and enjoy the freedom that comes with being your own boss.



## **It's time for year-end website updates.**



Check links, add some new content, and make sure anything with a date (like your footer!) is ready to update in January.

Don't forget to do a manual search for security patches and updates.

*Cybercriminals love to wreak havoc while everyone is distracted with the holidays.*

# Celebrate this year's successes and failures!

Yes, failures. Smart entrepreneurs know that failure represents new opportunities.

Make a list of things that didn't go as planned. Are there any obvious commonalities? Are they things other people struggle with?

Set aside half an hour to brainstorm solutions. At the end of the session,

review the results.

Can any of the new ideas you listed be used as a new product or service?

Can you use the ideas to create an article, customer freebie, or download?

Consider the possibilities and don't forget to use the **Products & Services Development Planner** to vet your ideas.



# Great Job!



# 2023 In Review

## ***Congratulations and thank you for joining us for the premier edition of The Business Guild's Annual Playbook.***

Like you, we've applied the plays and tools included in this year's edition to our everyday operations.

We've used the plays as a reminder to stay on top of key activities, and embraced this year's theme, audacious, as a focus across all aspects of The Business Guild.

After completing 60 monthly plays, 4 quarterly checklists, and a variety of business planning tools, you've brought some audaciousness, organization, and structure to how you manage your business.

- Goals & Planning
- Sales & Marketing
- Customer Relationships
- Back Office
- Work/Life Balance

As an existing business owner, it's likely you already handled some of these activities as part of your routine, but we hope our gentle nudges and suggestions have helped you create a structure to incorporate all five

areas of business ownership into your busy days.

For new business owners, you now have a good understanding about all the essential activities that need to be tended to in addition to providing your services to clients.

Thank you for joining us on this journey. Be sure to watch for next year's edition with new plays and a brand new theme.

*Patricia Hammond and Lisa J. Jackson*  
Co-Founders, The Business Guild



# Links to All the Downloads

Here is a list, with links, to all of the downloads mentioned in the 2023 Annual Playbook.

Title: \_\_\_\_\_ Prepared for: \_\_\_\_\_  
 Subtitle: \_\_\_\_\_ Prepared by: \_\_\_\_\_  
 Date: \_\_\_\_\_ Vers: \_\_\_\_\_

Sales/Marketing		Value Proposition		Community	
Customers	What problem do you solve?	How is your product better?		Partners	
Relationships	Cost	Revenue Streams	Competitors	People	Skills
Channels					
Market Size/Opportunity					
Activities		Materials		Distribution	

Business Canvas © The Business Guide 2023

**Business Planner**

Goal: \_\_\_\_\_ Prepared for: \_\_\_\_\_  
 Due Date: \_\_\_\_\_ Prepared by: \_\_\_\_\_  
 Date: \_\_\_\_\_ Vers: \_\_\_\_\_

What you want to do	How you're going to do it	Resources you will need
What do you want to achieve? By when you need or need to do this?	Provide detailed explanation for how you will do this. Metrics - Define & measure success	List resources you need to succeed - People, Skills, Time, Materials How much will it cost?
Why do you want to do this?		
Is it relevant? Does this align with your mission?	Timeline & Benchmarks Provide a general timeline with benchmarks	

Goal Planner Canvas © The Business Guide 2023

**Goal Planner**

Title: \_\_\_\_\_ Prepared for: \_\_\_\_\_  
 Subtitle: \_\_\_\_\_ Prepared by: \_\_\_\_\_  
 Date: \_\_\_\_\_ Vers: \_\_\_\_\_

Start/End Dates	What is the goal for this strategy?
Who are you trying to reach?	List the steps to implement this strategy
What channels will you use to reach your customers?	What tools, people, or services will you need? (SEO, CRM, Zapier, content writer, videographer, etc.)
	How much will it cost and what is the expected revenue or benefit? Example: A strategy to improve user satisfaction by providing tips & videos for how to use a product might be represented as a 2% increase in additional purchases or referrals with a dollar value of \$10,000

Customer Relationship Planner © The Business Guide 2023

**Customer Relationship Planner**

Work/Life Balance Date: \_\_\_\_\_

Perfect Day/Week  
Define your perfect day or week, what you do, who you're with, & how it feels.

Top 3 Priorities	Wellness	Personal Development	Home/Chores
1. Use OOH to list this? Or tag you need or need to do this week.	What can you do to improve your health? (e.g., exercise, diet, sleep, etc.)	What are your goals for this year? (e.g., learn a new skill, read more books, etc.)	List all the chores you need to do (be specific about how much time each task will take).
2.			
3.			

Work Hours: \_\_\_\_\_ Identify an important task you need to do in the next week.  
 Important Tasks: \_\_\_\_\_  
 Benchmark/Personal Train: \_\_\_\_\_

Work/Life Balance Worksheet © The Business Guide 2023

**Work/Life Balance Worksheet**

**Monday Activities**

Day	Start	End	Total	Category	Activity
1/10/22	8:00	8:30	30	Work	At the office
1/10/22	8:30	8:45	15	Work	At the office
1/10/22	8:45	9:00	15	Work	At the office
1/10/22	9:00	9:15	15	Work	At the office
1/10/22	9:15	9:30	15	Work	At the office
1/10/22	9:30	9:45	15	Work	At the office
1/10/22	9:45	10:00	15	Work	At the office
1/10/22	10:00	10:15	15	Work	At the office
1/10/22	10:15	10:30	15	Work	At the office
1/10/22	10:30	10:45	15	Work	At the office
1/10/22	10:45	11:00	15	Work	At the office
1/10/22	11:00	11:15	15	Work	At the office
1/10/22	11:15	11:30	15	Work	At the office
1/10/22	11:30	11:45	15	Work	At the office
1/10/22	11:45	12:00	15	Work	At the office
1/10/22	12:00	12:15	15	Work	At the office
1/10/22	12:15	12:30	15	Work	At the office
1/10/22	12:30	12:45	15	Work	At the office
1/10/22	12:45	1:00	15	Work	At the office
1/10/22	1:00	1:15	15	Work	At the office
1/10/22	1:15	1:30	15	Work	At the office
1/10/22	1:30	1:45	15	Work	At the office
1/10/22	1:45	2:00	15	Work	At the office
1/10/22	2:00	2:15	15	Work	At the office
1/10/22	2:15	2:30	15	Work	At the office
1/10/22	2:30	2:45	15	Work	At the office
1/10/22	2:45	3:00	15	Work	At the office
1/10/22	3:00	3:15	15	Work	At the office
1/10/22	3:15	3:30	15	Work	At the office
1/10/22	3:30	3:45	15	Work	At the office
1/10/22	3:45	4:00	15	Work	At the office
1/10/22	4:00	4:15	15	Work	At the office
1/10/22	4:15	4:30	15	Work	At the office
1/10/22	4:30	4:45	15	Work	At the office
1/10/22	4:45	5:00	15	Work	At the office

Monday Activities © The Business Guide 2023

**Weekly Time Tracker**

Title: \_\_\_\_\_ Prepared for: \_\_\_\_\_  
 Subtitle: \_\_\_\_\_ Prepared by: \_\_\_\_\_  
 Date: \_\_\_\_\_ Vers: \_\_\_\_\_

Customers		Competitors	
Who are you trying to reach?	How is your product better?	Who are your competitors?	
What problem do you solve?	What do your customers value?	What are their strengths?	What are their weaknesses?
Channels	Metrics	Cost	Funding
ROI		ROI	

Marketing Canvas © The Business Guide 2023

**Marketing Planner**



Title: _____		Prepared for: _____	
Subtitle: _____		Prepared by: _____	
		Date: _____	Ver: _____
<b>What's Been Done</b> List completed tasks	<b>Current Status</b> Provide summary of current situation	<b>What's Left To Do</b> List next steps	
<b>Issues</b> List known or potential problems	<b>Opportunities</b> List new or possible opportunities	<b>Solutions</b> List solutions for anticipated problems/opportunities	
	→	→	

Sales Planer Center © The Business Guild 2022

**Status Check**

Title: _____		Prepared for: _____	
Subtitle: _____		Prepared by: _____	
		Date: _____	Ver: _____
<b>What do you want to achieve in the next 5 years?</b> Give a short description of where you want to be 5 years from now. General ideas are fine, we'll get to specifics below.			
<b>Current Status</b> What is your company's current status in relation to where you want to be? Think about revenue, market position, customer base, cash flow, and employees.	<b>What do you want to do?</b> Define your desired outcome	Why do you want to do this?	
List known or potential challenges	List potential opportunities (for new products, markets, or partnerships)	Does this align with your vision?	
<b>How are you going to do it?</b> List steps to get from where you are to where you want to be. These are the foundation of actionable goals.	<b>How will you define and measure success?</b>	<b>What will you need?</b> List people, partners, or team members you need to succeed. This can be a specific person or a general category.	<b>How much time will it take to achieve each benchmark?</b>
	What skills will you need to succeed?	What materials will you need?	How much will it cost?

Sales Planer Center © The Business Guild 2022

**5-Year Strategic Planner**

Campaign Title _____			Prepared for: _____	
Subtitle _____			Prepared by: _____	
			Date: _____	Ver: _____
<b>Prospecting</b> Identify the customer	<b>Preparation</b> Identify customer's pain point	How do you solve their problem?	<b>Presentation</b> Demonstrate Value	
Connect with the customer	How is your solution different/better?		Overcome Objections	
<b>Closing</b> Ask for the Sale	<b>Follow Up</b> Build long-term relationship	Ask for referrals		
		→		

Sales Planer Center © The Business Guild 2022

**Sales Planner**

**Find more worksheets and planners on our Succeed pages at [thebizguild.com](http://thebizguild.com).**



**"Success is the child of audacity."**  
- Benjamin Disraeli