



90-Day Action Plan Challenge

Why take on this 90-Day Action Plan? Let one of our clients answer for you:

"Thanks to a little coaching from Jake, I have now over-doubled my income and quadrupled my profits! It took some effort, but it's worth every minute!"

Jaclynn Beach, Owner

How Easy is it?

Simple. There are 4 Steps to complete the program, plus goals you set and achieve. The results are being more organized and a more profitable business! We give you 341 ways to increase your business profits!

How does it work?

Even easier. We deliver you the packet, which you complete and return for review. Then, you spend the next 90 days completing the goals. We follow up with you and measure the results at 90 days.

"As a business owner, I have never profited greater than when I had a coach holding me accountable to my desired goals. Not only did I achieve them, year after year, but the end results are more money, more structure and freedom, and peace of mind."

Jake Hanes, Owner with 12 years being coached

How do I start?

Just say the word! The fee is \$249, which will include up to 2 hours of one-on-one coaching. We will email you the packet and schedule the first follow-up date. It's that easy!

Our Guarantee to you

If you follow the program as outlined, and complete the 90 Day Plan, and do not achieve measureable improvement in your business, Action Tax Service will refund you 150% of the fee charged! We guarantee you will have measureable results!

90-day Action Plan Challenge

The format provided below is a summary of the best business coaching session ever given to our firm. Included are key questions to answer for your business, which will drive you in the directions that will produce maximum growth and profit for your company. Methodically answer each question, make lots of notes on ideas you come up with, and always keep the 90-Day Action Plan goal sheet handy to write your goals down using the SMART method for review by your CPA.

A note from your CPA: "I am delighted you are taking this action on your business! Every action you take, from these resources provided, is going to dynamically improve your gross revenues and net income, guaranteed! Once completed, email your entire report to me at jhanes@actiontaxteam.com for review and feedback. Good luck!

Now is the time, this is the place, and you are the one to create success in your business. Turn the page and let's begin!

STEP 1:

Answer each of the following questions with a rating (1=excellent to 5=not at all), and make notes on what needs to be done.

- 1) I know on average how much I make on each sale? Rate____

- 2) I know how many sales, customers and \$\$ I need to make per month to break even and to make the profit I desire? Rate____

- 3) I have a budget for profit and daily/weekly/monthly activity goals to help me achieve it? Rate____

- 4) I have a minimum of 5 strategies in place to increase my gross profit? Rate____

- 5) I have a written marketing plan and budget to drive results? Rate____

- 6) I have a regular time set aside to plan and prioritize key activities to drive success? Rate____

- 7) I work ON (not just in) my business for a minimum of 4 hours per week? Rate____

- 8) I have time slots in my day/week for my own health and enjoyment to create balance and ultimately increase business productivity? Rate____

- 9) My business has a defined Customer Service Level that all team members are aware of and are monitored against? Rate____

- 10) I/We have surveyed our customers, scripted our greeting/communication process and actively defined ways to improve customer relations/communications? Rate____

- 11) I have reviewed the activities of my business and my own roles, and taken action to outsource, delegate, and/or hire others to do work for me, such that I can focus on work that will produce the maximum rate of return for my company? Rate____

- 12) I know the number of leads coming into the business and where they come from? Rate____

- 13) I have implemented 10 lead generation strategies to bring in new business? Rate____

- 14) I know and record my conversion rate from a lead to a Sale? Rate____

- 15) I know and record the number of times a client purchases from me in a day/week/month/year? Rate____

- 16) I know and record my Average Dollar Sale? Rate____

- 17) I know what my most profitable lead generation strategy is and I focus more of my marketing dollars on this? Rate____

- 18) I constantly bill people timely, collect rapidly, establish controls for collections, and reward customers for early payments or require payment up front/at completion? Rate____

- 19) I reconcile my bank account monthly, monitor cash flows, and steam line bill payments and tax obligations? Rate____

- 20) I timely complete and pay all taxes (Payroll, Excise, Federal, etc)? Rate____

- 21) I have a system in place for saving for an emergency, a vacation, and retirement? Rate____

- 22) Our company has a powerful USP (Unique Selling Proposition, slogan) in place that is visible to all customers and staff? Rate____

- 23) Our business has a meaningful Guarantee in place that is published and used in the all sales communications? Rate____

- 24) I have identified my target market and actively market to them? Rate____

- 25) I actively work with at least 3 strategic partners who target the same market? Rate____

- 26) I have at least two effective referral strategies in place that work well? Rate____

- 27) The sales team (or just myself), is setting and meeting sales goals on a regular basis? Rate____

- 28) The business has a database of clients and prospects and we contact them at least quarterly with offers and information? Rate____

- 29) I have dropped my most challenging customers, freeing up time for many more "A" customers? Rate____

- 30) I have systems in place to up-sell and cross-sell other products/services? Rate____

- 31) I have a computerized system for tracking leads, customers, and marketing details? Rate____

32) There are regular, verified backups of data, and my computer(s) have current virus protection and password securities, and my office is secured? Rate____

33) I am using the best software and automation available to steam line and save time? Rate____

34) For employees, I have an Employee Manual, Policies and Procedures Manual, and a Hiring, Training and Firing Process in place? Rate____

35) Each employee understands how their achievements will be measured? Rate____

36) I have systems for staff reviews, staff appreciations, and team goals? Rate____

37) I have a system in place for recruiting, hiring, and training new staff? Rate____

38) I hold regular team meetings? Rate____

39) I have a company Vision and Mission Statement visible to all? Rate____

40) There is an often repeated common goal our team is aiming for? Rate____

41) Everyone including myself is committed to being "Above the Line" – taking Ownership, Accountability and Responsibility for their actions? Rate____

42) Our company has a system in place for rewarding performance? Rate____

43) Our company has a clearly defined Organizational Chart with job descriptions? Rate____

44) I consistently live by the Values, Vision, Mission and Goals of the company? Rate____

45) I am investing and growing assets outside of my business, giving back to charity, and mentoring others? Rate____

Step 2:

Now, look at the 5 Ways Chart in detail, reviewing each item in each section.

- 1) Circle every action that you are currently doing in your business, in each area.
- 2) You should have 10 lead generation strategies, 10 Conversion Rate Strategies, 5 Number of Transactions Strategies, 5 Average \$\$ Sale Strategies, and 5 Profit Margin Strategies. If you do not, identify below the best ones to implement into your business.
- 3) Estimate the cost of implementing each strategy for the next 90 days.

Lead Generation Strategies

- | | | |
|-----|-------|------------|
| 1) | _____ | - \$ _____ |
| 2) | _____ | - \$ _____ |
| 3) | _____ | - \$ _____ |
| 4) | _____ | - \$ _____ |
| 5) | _____ | - \$ _____ |
| 6) | _____ | - \$ _____ |
| 7) | _____ | - \$ _____ |
| 8) | _____ | - \$ _____ |
| 9) | _____ | - \$ _____ |
| 10) | _____ | - \$ _____ |

Conversion Rate Strategies

- | | | |
|-----|-------|------------|
| 1) | _____ | - \$ _____ |
| 2) | _____ | - \$ _____ |
| 3) | _____ | - \$ _____ |
| 4) | _____ | - \$ _____ |
| 5) | _____ | - \$ _____ |
| 6) | _____ | - \$ _____ |
| 7) | _____ | - \$ _____ |
| 8) | _____ | - \$ _____ |
| 9) | _____ | - \$ _____ |
| 10) | _____ | - \$ _____ |

Number of Transactions Strategies

- | | | |
|----|-------|------------|
| 1) | _____ | - \$ _____ |
| 2) | _____ | - \$ _____ |

- 3) _____ - \$ _____
- 4) _____ - \$ _____
- 5) _____ - \$ _____

Average Dollar Sale Strategies

- 1) _____ - \$ _____
- 2) _____ - \$ _____
- 3) _____ - \$ _____
- 4) _____ - \$ _____
- 5) _____ - \$ _____

Profit Margin Strategies

- 1) _____ - \$ _____
- 2) _____ - \$ _____
- 3) _____ - \$ _____
- 4) _____ - \$ _____
- 5) _____ - \$ _____

Total Marketing Budget for this Period \$ _____

This list represents the ultimate goal for your business in marketing. It may not be possible to implement every strategy above right away.

Next, we will set goals on just what we will achieve in the next 90 days.

Step 3:

It's time to create your 90-day Action Plan! The key to success in goal setting is setting SMART goals:

S – Specific

M – Measurable

A – Attainable

R – Relevant

T – Time-based

These goals need to be Specific – You can identify exactly what you will achieve. Then, Measurable – You know exactly when you have achieved them. Next, Attainable – They can be accomplished at some point. After that, Relevant – They have a clear purpose. Finally, Time-based – In this case meaning they can be completed within 90 days, or at least measurable in progress by that time.

The following page is the Goals Worksheet. Please clearly identify at least 10 goals you will dedicate yourself to achieving in the next 90 days, around all the other things that happen at work and in life. Once completed, deliver the entire packet via email back to Jake Hanes, at jhanes@actiontaxteam.com for his review and sign-off. At this point, you will have activated the reticular activating system in your brain, which will begin to find ways to achieve each of these goals for you! To keep the Reticular Activating System on, do the following:

- 1) Post the goals in a place you will see them every day!
- 2) Set aside time each day to work directly on your plan, even if only 30 minutes!
- 3) Treat yourself to something special upon the completion of each goal
- 4) Be ready to report to Jake in 90 days! He will be contacting you!

90 Day Action Plan

For each goal, write out the goal, and identify how it is SMART

1. _____

Date completed by ___/___/___

2. _____

Date completed by ___/___/___

3. _____

Date completed by ___/___/___

4. _____

Date completed by ___/___/___

5. _____

Date completed by ___/___/___

6. _____

Date completed by ___/___/___

7. _____

Date completed by ___/___/___

8. _____

Date completed ___/___/___

9. _____

Date completed by ___/___/___

10. _____

Date completed by ___/___/___

ActionCOACH 5 Ways to Increase Your Business Profits...

$$\boxed{\text{No. of Leads/Prospects}} \times \boxed{\text{Conversion Rate}} = \boxed{\text{No. of Customers}} \times \boxed{\text{No. of Transactions}} \times \boxed{\text{Average $$$ Sale}} = \boxed{\text{Turnover}} \times \boxed{\text{Margins}} = \boxed{\text{Profits}}$$

Lead Generation

Conversion Rate

No. of Transactions

Average \$\$\$ Sale

Profit Margins

1. Local Newspaper Advertising	1. Written Guarantee	1. Better service, make your customers feel special, give them magic moments	1. Increase Your Prices	1. Increase Your Margins/Prices
2. Daily Newspaper	2. Define Your Uniqueness	2. Under Promise & Over Deliver	2. Up Sell	2. Sell More Big Margin Goods or Services
3. Television Advertising	3. Develop Your Own Product Line	3. Streamline Your Service	3. Cross or Add On Sell	3. NO Discounting
4. Radio Advertising	4. Sell an Exclusive Line	4. Deliver Consistently & Reliably	4. Down Sell	4. Sell Only Quality
5. Magazine Advertising	5. Increase Range or Variety	5. Keep in Regular Contact	5. Use a Checklist	5. Sell Your Own Label
6. Trade Journal Advertising	6. Provide Quality Products	6. Inform Customers of Entire Range	6. Allow Payment Terms	6. Sell an Exclusive Label
7. Industry Newsletter Ads	7. Print a Benefits List	7. Increase Your Range	7. Arrange Easy Finance	7. Sack C's and D's
8. School Newsletter Ads	8. Use a Testimonial List	8. Increase Product Obsolescence	8. Carry Exclusive Lines	8. Keep an Accurate Database
9. Newspaper, Magazine & Newsletter Inserts	9. Before & After Photo's / Demo's	9. Introduce Upgrades Regularly	9. Rearrange Store Layout	9. Sell Via Direct Mail/Internet
10. Public Relations	10. Show Samples / Example Photo's	10. Always have Stock	10. In-store Merchandising	10. Sell Via Party Plan/Multi Level
11. Press Releases	11. Quality Brochures	11. Offer Service Contracts	11. Point of Sale Material	11. Commission Only Sales Team
12. Letterbox Flyers	12. Information Sheets / Booklets	12. You keep clients vital information for them, develop your own language	12. Impulse Buys	12. Provide Team Training
13. Sidewalk Handbills	13. Added Value Offers	13. Product of the week / month	13. Product Packaging	13. Pay NO Overtime
14. Catalogues	14. Make an Offer	14. Ask them to come back	14. Sell with an Either/Or Question	14. Reduce Team Size
15. Brochures	15. Start a Trend / Fad	15. Use Call Cycling	15. Create Package Deals	15. Reduce Unnecessary Management
16. Yellow Pages	16. Product / Price Listings	16. Send out a Newsletter	16. Create Bulk Buy Deals	16. Reduce Directors Fees
17. White Pages	17. Team Member Profiles	17. Run a Frequent Buyers Program	17. Gift with EXX Purchase	17. Efficiency, Productivity & Time Management
18. Directories	18. Write Company's Magic Story	18. Create a Membership /VIP card	18. Allow coupons, cheques & credit cards	18. Negotiate Employment Agreements
19. Barter / Trade Exchanges	19. Packaging	19. Collect a Database of Past Clients	20. Make sure clients know your full product and service list	19. Team Incentives Based on Margins
20. Buy Database Lists	20. Display Awards / Certificates	20. Give out Members Cards or Key rings	21. Charge Consulting Fees	20. Reduce Duplication
21. Direct Mail	21. Account Applications	21. Use a Multiple Purchase Card	22. Sell Service Contracts	21. Know Your Actual Costs
22. Piggy Back Invoice Mailings	22. Allow Mail Order, Home Delivery	22. Pre-sell or take pre-payments	23. Sell Extra Warranty/Insurance	22. Work Costs as Percentage of Sales
23. Tender Lists	23. Pre-send Appointment Cards	23. Contracts	24. Train Your Team	23. Set Monthly Expenditure Budgets
24. Fax Outs	24. Point of Sale Displays	24. Till Further Notice Deals	25. Use Sales Scripts	24. Only allow your Team to buy with an Authorised Purchase Order
25. Billboards / Posters	25. Use Payment Plans & Financing	25. Re-book next visit now	26. Train Your Customers	25. Better Negotiation Skills
26. Shop-a-Dockets	26. Take credit cards, cheques & Eilpos Daily / Weekly inst Breakdown	26. Plan Future Purchases with clients	27. Stock More High Priced Ranges	26. Reduce ALL Costs by 10%
27. Taxi Backs	27. Flowchart Your Sales Process	27. Offer on next purchase	28. Create a Quality Image	27. Do a Right the First Time
28. Cinema Advertising	28. Audio, Video & CD sales demo's	28. Reminder System	29. Only Service 'A' Grade Customers	28. Recycle
29. Sponsorships	29. Re-write Quotes, Tenders and Proposals into Action Plans	29. Offer Trade-Ins	30. Sack 'C' & 'D' Grade Customers	29. Decrease Range
30. Post Card Mailings	30. Print Company's Vision/Mission Use Prospect Questionnaires	30. Increase Credit Levels	31. Allow Trade-ins/Trade-ups	30. Take Stock on Consignment
31. Internet / Web Pages	31. High Dress Standards/Uniforms	31. Offer Incentives / Rebates	32. Offer Home Delivery	31. Lower \$\$ tied up in Inventory
32. Building Signage	32. Try Before You Buy	32. Target likely Repeaters	33. Charge for Delivery/Post & Package	32. Only Sell Fast Moving Stock
33. Car Signage	33. In-store Merchandising	33. Post Purchase Reassurance	34. Build Rapport / Treat as Special	33. Buy In Bulk, pay & receive overtime
34. In-store & Sidewalk Signage	34. Great Products & use their Name	34. Educate on Full Value	35. Set an Average \$\$\$ Sale Goal	34. Buy Direct
35. Window Displays	35. Introduce Yourself	35. Suggest Alternative Uses	36. Measure the Average \$\$\$ Sale	35. Manufacture Yourself
36. Passing Trade	36. Smile, Build Trust & Rapport	36. Special Occasion Cards/Gifts	37. Customer Incentives for Bigger Purchases eg. Fly Buy Points	36. Repackage Smaller/Own Label
37. Point of Sale Material / Displays	37. Ask Questions & Listen	37. Direct Mail Regular Offers	38. Team Incentives for Bigger Sales	37. Promote Idle Time
38. Product Packaging	38. Provide Ideas and Advice	38. Follow Up & Follow Up Again	39. Stop Discounting	38. Rent Idle Space
39. Video / In-store Displays	39. Educate on Value, not Price	39. Telemarketing	40. Add Value	39. Work 2 or even 3 shifts
40. Shopping Centre Promotions	40. Increase a Timely Response	40. Run Competitions	41. Give Away Perceived Value	40. Have Smaller Outlets
41. Create an Industry Newsletter	41. Increase Product Knowledge	41. Past Customer Events/Promotions	42. In-store Promotions	41. Work from Home
42. Stickers and Tags	42. Educate How to buy, What to do	42. Closed Door Sales	43. Red Light Specials	42. Have a Mobile Business
43. Fridge Magnets	43. Use NLP Techniques	43. Fax Sales	44. Educate on Value, not Price	43. Join/Start a Buying Group
44. Named Promotional Gifts	44. Sell on Emotion & Dreams	44. Named Promotional Gifts	45. Ask people to Buy Some More	44. Re-finance
45. Blimps, Balloons, Plane Banners and Skywriting	45. Follow Up & Follow Up Again	45. Information Nights	46. 4 for the price of 3 offers	45. Charge for a Finance Facility
46. Gov't Programs / Contracts	46. Ask for the Sale, Confirm the Sale	46. Free Upgrades for more Loyalty	47. Buy one get one Free offers	46. 30 Day terms to 7 days
47. Uniforms / Name Tags	47. 1800 no. & Reply Paid Address	47. Socialize with Clients	48. In-store Video Promotions	47. Invest in Technology
48. Business Cards	48. Provide Refreshments	48. Provide a Shopping List	49. Store, Team & Vehicle Appearance	48. Systematise the Routine, Humanise the Exceptions
49. Networking Functions	49. Entertain, Wine and Dine	49. Labels and Stickers	50. Suggest Most Expensive First	49. Automate as much as possible
50. Salespeople	50. Competitions, with follow up	50. Direct Mail Special Offers	51. Provide a Shopping List	50. Equipment/Machinery
51. Telemarketing	51. Make it easy to buy	51. Catalogues so Visitors can re-order	52. Have a Minimum £ Order Amount	51. Sell Off Old Stock
52. Cold Calling	52. Measure Conversion Rates	52. Cooperative Promotions	53. Allow Lay-By	52. Reduce/Eliminate Taxation Expense
53. Competitions / Surveys	53. Train entire team in Sales/Service	53. Sell other people's Products & Services	54.	53. Negotiate Fixed not Variable Expense
54. Host Beneficiary's	54. Provide Team Incentives	54. Rent / Sell your Database	55.	54. Employ People In-House
55. Strategic Alliances	55. Survey your past customers	55. Continually Clean up your database	56.	55. Outsource
56. Write a Book	56. Survey people who don't buy	56. Keep Good Data on Clients	57.	56. Move Premises
57. Seminars & Events	57. Provide a 1* Buyers Incentive	57. Tell your Magic Story	58.	57. Pay Cash rather than Loan Interest
58. Fetes & Shows	58. Office, Vehicle & Team Appearance	58. Build a Relationship	59.	58. Only Buy what you NEED
59. Open Days & Sign On Days	59. Lighting, Clean Toilets, Air Conditioning, Kids Room, Snack Bars and Background Music	59. Know your customers Name	60.	59. Use a company credit card for Bonus Points & up to 55 days interest free
60. Fundraising Campaigns	60. Accept trade-ins	60. Tell them Your Full Name	61.	60. Rent for maximum tax write off
61. Trade Shows	61. Bulk Buy Specials	61. Become their Friend	62.	61. Change Accountants
62. Party Plan	62. Scarcity & Limits, Fear & Pain	62. Offer Free Trials	63.	62. Beg, Borrow or Steal
63. Network Marketing	63. Hire more/some sales/telesales people	63. New Product Launches	64.	63. Keep Overheads to a Minimum
64. Distributors / Agents	64. Change your Direct Mail pieces	64. Train Your Team	65.	64. Stop Running Ads that don't work
65. Licenseses / Franchisees	65. Collect all prospects details	65. Offer a Shareholding in Company	66.	65. Measure Everything
66. Market Days	66. Stay in touch, cards, newsletters	66. Sell more consumables	67.	66. Regular/Timely Accounts
67. Change / Open More Locations	67. Give away to get back, Reciprocity	67. Rolling Timeline of Communication	68.	67. Get Phone Bills etc Checked
68. Trade Longer / Different Hours	68. Factory / Site Tours	68. Calendar Timeline of Communication	69.	68.
69. Open New Territories	69. Target better prospects	69.	70.	69.
70. Test & Measure	70. Company profile & business cards	70.	71.	70.
71. Provide Team Selling Incentives	71. Gimmicks with Direct Mail	71.	72.	71.
72. Team Buying Incentives	72. Charge for normally Free Advice	72.	73.	72.
73. Referral System	73. A Gift Cheque towards purchase	73.	74.	73.
74.	74. Always have stock on hand	74.	75.	74.
75.	75. Offer Exclusivity	75.	76.	75.
76.	76. Allow Prepayment	76.	77.	76.
77.	77. Set Sales Targets	77.	78.	77.
78.	78.	78.	79.	78.
79.	79.	79.	80.	79.
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81.	81.	81.	82.	81.
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