



THE PROFITABLE BUSINESS ROADMAP

So, you're sick of dealing with the finances in your business. We completely understand.

You want a simpler, less-frustrating way to handle the money- and you wouldn't mind a little more cash in your pocket, either. Sure, change is hard- but our profit coaching takes out the guesswork. Before you know it, you'll be back to doing the things you love knowing your business has become a profit-generating machine!



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☐ 1. Remember Your Why

You started a business for a reason, right? Did you want more time? Freedom to travel? More money? Take time to revisit this (or create one) and write it down.

☐ 2. Lifestyle Snapshot

Create a monthly budget for your personal life. What does your business need to earn to support this lifestyle? Is the business currently earning enough?

☐ 3. Keep it Separate

Your business money should be separate from your personal finances. Open a separate business account that only funds business expenses.

☐ 4. Prospecting

Keep your pipeline filled with prospects. Are you consistently looking for new clients? Are you attracting the right clients? Which methods work best?

☐ 5. Converting Clients

Sales are an essential part of a profitable business. Are you successful in turning your prospects into paying clients? Are they your ideal clients?

☐ 6. Profit First

Standard accounting puts profit last: Sales-Expenses=Profit. Instead, take your profit first and run the business on the rest: Sales-Profit=Expenses.

☐ 7. Five Core Accounts

Break your finances into 5 core groups: Income, Profit, Owner's Pay, Taxes & Operating Expenses. Open 5 bank accounts and give them these labels. [Watch this video to learn more.](#)

☐ 8. Move Money

All revenue flows into the income account. Move money from income into the other 4 accounts. All expenses are paid from the operating expense account.

☐ 9. Current Percentages

Assess where your business currently stands. What percentage of your revenue currently needs to be moved from income into the 4 accounts?

☐ 10. Target Percentages

Decide where your business should be. What percentage of your revenue should be moved from income into the 4 accounts? [Book a free coaching call with us to determine these numbers.](#)

☐ 11. Establish a Rhythm

Decide how frequently you'll move money from the income account to the other accounts. Weekly? Bi-Weekly? Then, block it in your calendar and stick to it!

☐ 12. Eliminate Debt

Debt is an anchor on your cashflow. Eliminate it quickly so you have more money for profit and growth. We recommend the debt snowball method.

☐ 13. Pay Yourself More!

Set up a pay schedule and give yourself consistent paychecks. Every quarter, use the money in your profit account to pay yourself a bonus. You've earned it!