

# Personal Planning Kit

This Personal Planning Kit belongs to:

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Date of completion: \_\_\_\_\_

## Compass points to guide you

- Simplicity is your greatest asset.
- Spend nothing until you need to.
- Keep your hands and your money in your pockets.
- Do what you can for free.
- Update your cashflow forecast each week.
- You are your business.
- Remember to watch out for fireworks.
- Love your business and it will love you back.

## Avoid a spanking

- S Self** – check out your own awareness and your style of working.
- P Plan** – cash, time, budgets, networking.
- A Assumptions** – you will live or die by them.
- N Networking** – tell people you exist.
- K Kick ass** – Get going: business requires energy, motivation and slog.

To download a copy of your Personal Planning Kit, please visit [www.richardmaun.com](http://www.richardmaun.com)

**Section 1: A Sense of the Future (page 14)**

**Part A:** Relax and let your thoughts and feelings swirl about. What is your sense of what you would like to do? No need to be precise, if you're not too sure. Write down the *sort* of thing that you fancy having a go at:

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**Part B:** Now imagine you are doing some of the stuff from Part A. For fun, have a go at describing what your working week, or an average day, looks like. Write it, draw it or just jot down some points to capture the feeling of actually being there:

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**Part C:** What new skills or experience do you need to acquire to help turn your dream into a reality? How will you get what you need?

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**Part D:** What resources will your business need to get started? Think about equipment, people, premises, stock, insurance, training and any critical 'must have' items:

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**Part E:** What type of business will you be? Tick an option:

- Sole trader
- Limited company
- Partnership

**Section 2: Assumptions and Bank of Family (page 23)**

**Part A: Assumptions.** List the ones you are making about the size and shape of your business – and remember to look around you at current competitors. If your local florist drives an old van, then wonder why. Or if your chum who is a consultant spends all her time away from home, ask her how much she spends on food and hotels ...

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**Part B: Bank of Family.** How much emotional credit do you have lodged with them, that you can draw on to support you through the tough times ahead? On a scale of 1 to 50 ask *your family* to put a cross on the line to show you where they are:

1-----50  
 (not much credit) (loads of credit)

**Section 3: The Fireworks Code (page 42)**



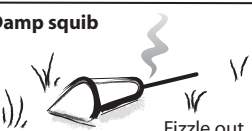
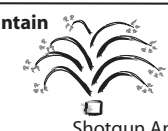
Copy your scores onto the scales and then circle the firework that best represents the behaviour others are likely to see from you:

**A Thinking**

Quick, or shallow thinking – 1 2 3 4 5 6 7 8 9 10 – Deep thinking, or fixated thinking

**B Activity**

Inactivity, or sluggish movement – 1 2 3 4 5 6 7 8 9 10 – Train-track direction, or shotgun approach

Firework Model of Stress (FMOs)		
<b>Hyper Thinking</b>	<b>Catherine Wheel</b>  Round in circles	<b>Rocket</b>  Lost in space
<b>Lazy Thinking</b>	<b>Damp squib</b>  Fizzle out...	<b>Fountain</b>  Shotgun Approach
<b>BEHAVIOUR</b>	<b>Lazy Activity</b>	<b>Hyper Activity</b>

**Section 4: Your Supporters Club (page 46)**

Note down the contact details and the reason why each person is on your list. If you're stuck for a great reason, then choose again:

1 \_\_\_\_\_  
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10 \_\_\_\_\_  
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### Section 5: Team Questions (page 48)

Add five more questions to the list that you would like to ask your supporters club. Any question that has value to you is a good question! Useful questions:

- 1 What questions do I need to ask you?
- 2 If you were starting today, what would you do differently?
- 3 How do you find new customers?
- 4 When did you get it wrong and what did you learn?
- 5 Who do you know who would be useful for me to talk to?
- 6 \_\_\_\_\_
- 7 \_\_\_\_\_
- 8 \_\_\_\_\_
- 9 \_\_\_\_\_
- 10 \_\_\_\_\_

### Section 6: I am Special Because ... (page 50)

Write down the strengths, skills and useful experiences you have which you would share with clients, in order for them to be reassured that you are worth spending money with:

1 My strengths include:

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2 My skills include:

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3 My relevant experience includes:

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**Section 7: Creating an Opening (page 62)**

Ask questions to get the client talking and to generate an opening, which you can fill with your product and/or service. Note three examples, one closed and two open:

Closed question:

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Open question:

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Open question:

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**Section 8: Selling by Numbers (page 69)**

List the products you will sell, the volume of your sales in the first year and the price you will sell them for. Then add up your guesses, trim them back to 80 per cent and discover whether this income will pay all the bills. An example is included – and remember to leave it out of your totals!

Item	Volume per year	Unit price	Volume x price = sales	Be cautious	Cautious total
Cheese roll	5,000	£0.75	£3,750	x 80% =	£3,000
Total forecast	=				

**Section 9: The Name Game (page 78)**

My three possible business names are:

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

Tick when you have checked them at Companies House, the Patent Office and made sure the website address is available for your favourite:

**Section 10: Differentiate or Die (page 82)**

**Part A:** Write down the negative messages you have in your head, then cross them out! They no longer have value to you:

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**Part B:** Write down what you know about your closest competitor. What products/services does he/she/it offer? Why do people buy from them?

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**Part C:** Yourself. What do you well?

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**Part D:** Your business. Think about what you will do. How will you do it differently from your competitor? Remember to include small details, as all differences have value.

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### Section 11: Marketing Toolbox (page 85)

Which marketing tools will you need to let people know you exist? Tick the ones you will organize, but think about the costs involved as well, as you may not need or be able to afford all of them.

- Business card
- Pre-printed letterhead
- Compliments slip
- One-page leaflet
- Multi-page brochure
- Press release
- Magazine advert
- Special packaging

### Section 12: Net-Work (page 95)

What specific business opportunity will you be asking the people in your network to look out for? Write it here in one short sentence.

☺ I am looking for:

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Secondly, think about people you already know to whom you could mention this opportunity. Add as many names as you can to each of the categories below:

- ☺ Friends
- ☺ Family
- ☺ Leisure clubs
- ☺ Ex-colleagues
- ☺ Suppliers
- ☺ Competitors
- ☺ Local businesses
- ☺ Who else?

**Section 13: Your Skinny Minute (page 102)**

Write down eight key points that describe your business. Paula's Pets is used as an example on the right-hand side.

**Your business**

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

**Paula's Pets**

1. Exotic
2. Reptiles
3. Five years
4. Homes and schools
5. Seven poisonous snakes
6. Insurance
7. Pole dancing
8. Chameleons

**Section 14: Trawling (page 114)**

Clear contracting for success is about the administrative details, the goals and processes and the fishy bits. Write down three questions Peter could have asked at his interview to find some of the fish which were clearly lurking in the depths:

Q1 \_\_\_\_\_

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Q2 \_\_\_\_\_

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Q3 \_\_\_\_\_

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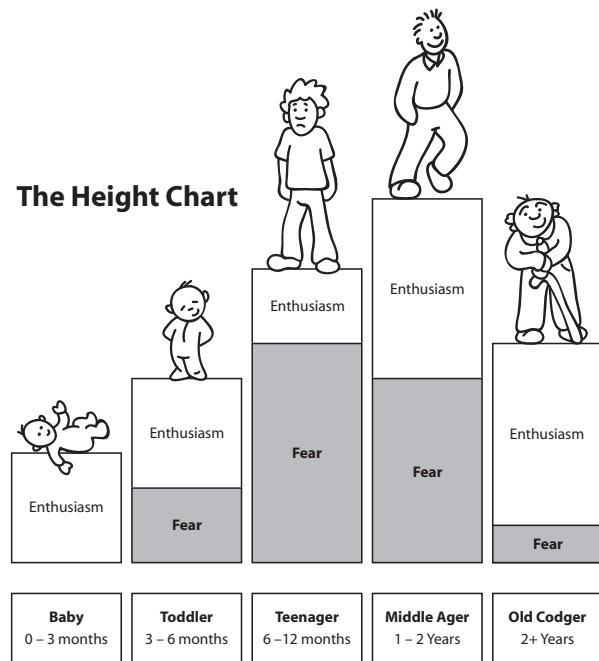
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\_\_\_\_\_?

### Section 15: The Height Chart (page 130)

Tick the box that best describes your mood today, then cement this by colouring in the cartoon on top of the bar of your current stage.

- Baby** – just born into an exciting world
- Toddler** – one or two skills, lots of enthusiasm
- Teenager** – fed up and worried at your lack of instant success
- Middle Ager** – worldly and experienced, some success balanced by continued effort
- Old Codger** – sustainable and complacent, watch out for the younger hungry types



### Section 16: Lucky Numbers (page 145)

Produce a profit and loss spreadsheet for your first three years of trading. Use the example in the chapter as a guide if it helps. Then when you have a useful document, tick the box!

- I have a P&L spreadsheet that I am happy with 😊

### Section 17: Cash or Crash (page 151)

If you do nothing else by way of business planning, at least draw up a cashflow forecast. Check your assumptions and build in some contingency, because it will rain at some point! Then tick the boxes:

- I have a cashflow forecast covering the first six months.
- I have a cashflow forecast covering the first two years, taking me into a successful position.

### 😊 Celebration Time

Well done me, for making it this far. I have completed a useful planning exercise and feel very proud of myself. Full of confidence, I can tick 'yes' to the following essential skills and resources:

- I have talent.
- I will be successful.
- I understand the difference between profit and cash.
- I know what sort of firework best describes me.
- I have a sexy skinny minute in my pocket.
- I am ready to work my network.
- I am a special loveable person who can follow their own path in life.
- I have my own chair and I'm keeping it to myself!

### Hooray!

The bastards are now way behind me and the future looks fantastic.



### **About the Author**

**Richard Maun** is a professional business manager who has worked in industry for many years. He now enjoys life as a freelance business writer, as a director of his own company and as a visiting lecturer to a leading UK university. Richard facilitates personal and business development through coaching, management consultancy and interactive workshops, and he specializes in personal communication skills. He has worked with a wide variety of people to help them act in awareness, develop new thinking, turn conflict into collaboration and learn about themselves in a safe and supportive way.

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