



PurposefulSP.com

BUSENESS/ENTREPRENEURIAL

Coaching Sessions

Each session, we'll work on the biggest challenges and opportunities facing your business. When business issues aren't pressing, each month will be devoted to a different theme covering the four core aspects of business planning; Strategic Planning, Operational Planning, Marketing Planning, & Management Planning.

MONTHLY THEMES:

Q1: Strategic Planning

- January ▶ Vision, Brand, & Vital Few Goal Setting
- February ▶ Target Market & Environmental Scanning
- March ▶ Product Development & Distribution

Q2: Marketing Planning

- April ▶ Promotions
- May ▶ Pricing
- June ▶ Sales & Sales Management

Q3: Operational Planning

- July ▶ Mid-Year Financials (Progress Check & Plan Adjustments)
- August ▶ Operations & Time Management
- September ▶ Legal & Risk Management

Q4: Management Planning

- October ▶ Human Resources & Organizational Development
- November ▶ Leadership & Motivation
- December ▶ Year-End Financials (Review & Planning)

FEES:

Monthly Coaching: 2.5% of Total Owner's Compensation

- Fee paid monthly – \$350 minimum and \$1,000 cap

Quarterly Coaching: 1.5% of Total Owner's Compensation

- Fee paid monthly – \$200 minimum and \$500 cap

Total owner's compensation is calculated based on the owner's tax filing data including salary, draws, dividends, and other forms of income derived from or related to the business.